

AUSTRALIA

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U.S. DEPARTMENT OF COMMERCE
United States Travel
and Tourism Administration

**PLEASURE TRAVEL MARKETS
TO NORTH AMERICA:
AUSTRALIA**


Parpared for:

**UNITED STATES TRAVEL AND TOURISM ADMINISTRATION
TOURISM CANADA**

By:

MARKET FACTS OF CANADA LIMITED

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INTRODUCTION

FOREWORD

In 1986 the U.S. Travel and Tourism Administration and Tourism Canada made an agreement to undertake jointly funded market research in overseas countries of mutual interest. The agreement will be in effect for five years and during its existence approximately four countries will be studied each year.

By combining resources the national tourism organizations of the two countries will be able to produce better market information than either could have done by working alone. As a result, agencies marketing Canada, the United States or both will be able to select their target markets with a good deal more precision than has been possible in the past. In addition, agencies responsible for developing the tourism products of both countries will have a clear idea of what their strengths and weaknesses are in the minds of the consumer. They would then be able to develop a better tourism product and one that will have a strong appeal to consumers in a variety of overseas countries.

The countries studied so far are:

<u>1986</u>	<u>1987</u>	<u>1988</u>
United Kingdom	Hong Kong	Italy
France	Singapore	Australia
West Germany	Switzerland	Brazil
Japan		Mexico

This report on the Australian long haul travel market is one of the four that resulted from the 1988 studies. It is the intention of both Tourism Canada and the USTTA to make the results readily and widely available. The data are available in the following formats:

- The present main report
- A highlights report providing overviews of Italy, Australia, Brazil and Mexico
- Extensive computer cross-tabulations (see Methodology section for details)
- IBM compatible data diskettes in single punch format

A great deal of sophisticated travel market information has been made available through these studies. The challenge set forth by this work is to understand the information and to use it effectively. Officials of Tourism Canada and the USTTA are ready to help the tourism industry make the most effective use possible of the information.

OBJECTIVES

The objectives of this study are as follows:

1. To provide broad-based marketing information on the Australian long haul pleasure travel market for strategic planning purposes
2. To identify and describe Australian travel segments that are prime targets for travel to Canada and the United States for industry marketers
3. To describe elements of the travel product(s) required to meet the needs of the target travel market segments
4. To provide input to the development and placement of effective advertising and promotion to convert potential travel to actual travel to Canada and the U.S.

Accordingly the following research objectives were established:

1. To identify the basic long haul pleasure travel motivations, benefits and product/activity needs of Australian travelers
2. To identify and describe the size, travel characteristics, attitudinal and awareness characteristics of this market
3. To identify levels of awareness and perception of the various U.S. and Canadian travel products
4. To identify the media habits of the long haul traveler
5. To profile the Australian long haul pleasure travelers in terms of demographics, vacation style and lifestyle characteristics.

The main findings emerging from this study are the basis of this report.

METHODOLOGY

A total of 1,503 personal interviews were conducted with international travelers who met the following target qualifications:

- 18 years of age or over
- Took a vacation trip of four nights or longer by plane outside of Australia in the past three years, or intended to take such a trip in the next two years

Personal in-home interviews were conducted in five major cities: Sydney, Melbourne, Brisbane, Adelaide, and Perth. Households were screened by interviewers who followed pre-determined walk patterns from a total of 300 computer-selected starting points. In households with more than one qualified respondent a random selection was made using the next birthday method. The incidence of qualified respondents was determined by recording the results of these screening procedures.

Fieldwork was conducted from August 27 to September 18, 1988. A copy of the questionnaire used is included in Appendix II.

Detailed computer cross-tabulations of all study results have been provided under separate cover. The banners provided include the following:

- By sex, age, and life cycle
- By type of trip, trip description, ever visited both Canada/U.S., and city
- By important items and income
- By destinations visited and destination most like to visit
- By ever visited/interest in visiting Canada/U.S.
- By modes of transportation used within Canada/U.S.
- By provinces in Canada interested in visiting
- By miscellaneous destinations in Canada interested in visiting
- By states in U.S. interested in visiting
- By U.S. census regions interested in visiting
- By U.S. tourism regions interested in visiting
- By miscellaneous destinations in U.S. interested in visiting
- By travel philosophy, benefit and product segments

A table showing 95% statistical confidence limits for various base sizes is included in Appendix IV. In general, any results based on a sample size of less than 100 respondents should be viewed with some caution.

MAIN FINDINGS

1. MARKET SIZE

Before examining the actual survey results themselves, it is worthwhile examining the survey sample in the context of the overall Australian population. The following points can be noted:

- The Australian population 18 years of age or over is approximately 13,400,000 people (source: Australia 1986 census projections to June, 1988).
- The incidence of the target population of international travelers* is 35% or approximately 4,700,000 travelers. This incidence is very high compared with other markets studied in this series. This may be partly due to the definition used which only required long haul travelers to leave Australia to qualify.
- From external sources it is known that Australians took about 1,622,000 trips abroad in 1987. In 1988, they took about 91,000 trips to Canada and 332,000 trips to the U.S. It should be noted, however, that these figures include business trips, trips by any mode of transportation, trips of one night or more, and trips by children. In other words, these figures do not necessarily reflect the definition of long haul trips as used in this study.
- In addition, the EIU (Economist Intelligence Unit) Travel and Tourism Analyst No.1, 1989 noted the following regarding the Australian market:

"Some 1.6m Australians go abroad each year, lower than many developed countries, but high given the wide range of domestic attractions. Some traditional markets such as the U.K. are losing their appeal in favour of others like the U.S.A. The Australian visitor is becoming of first importance to such destinations as Indonesia and Thailand.

Immediate growth prospects are modest. In the longer term the market can be expected to continue to expand as the Australian economy advances, the Australian outbound market being more sensitive than most to fluctuations in economic performance, especially to changes in the exchange rate. Clearly the economic performance of the Australian economy is the key indicator of levels of outbound travel".

- Compared with the general population, the target market is better educated and wealthier. It should be noted that the income comparison is not a direct one in that the most recent data for the general population is based on the 1985/86 financial year. The differences are so strong, however, that even with more up-to-date general population data the conclusion would likely be the same.

(Reference: Tables 1 and 2)

* Travelers 18 years of age or over who took a vacation trip of four nights or longer by plane outside Australia in the past three years, or intended to take such a trip in the next two years.

TABLE 1

TARGET MARKET

Australian population 18 years or over	13,400,000 (1)
Incidence of target market	35%
Size of target market	4,700,000

Actual number of business or pleasure trips of one night or longer by any mode of transportation outside Australia (includes children under 18 years):

- To any destination in 1987 1,622,000 (1)
- To Canada in 1988 91,000 (2)
- To the U.S. in 1988 332,000 (3)

- (1) Australia Bureau of Statistics
- (2) Statistics Canada
- (3) USTTA

TABLE 2

COMPARATIVE TARGET MARKET DEMOGRAPHICS

	<u>Target market</u>	<u>General population</u>
	%	%
<u>Age</u>		
18 - 24 years	13	16
25 - 34 years	23	23
35 - 44 years	22	19
45 - 54 years	17	14
55 - 64 years	15	13
65 years or more	11	15
<u>Education</u>		
Primary	5	7
Secondary/high school	46	57
Technical/commercial	27	30
University/post graduate	(23)	6
<u>Household income in Australian dollars</u>		
Under \$20,000	16*	42**
\$20,000 - 29,999	16	16
\$30,000 - 39,999	16	10
\$40,000 - 49,999	13	8
\$50,000+	24	9
Refused	15	15

* Based on 1987/88 financial year

** Based on 1985/86 financial year

2. PAST TRIP BEHAVIOUR - 4 NIGHTS OR MORE

This section of the report examines the number and characteristics of recent trips of four nights or longer made by Australian travelers in the target market.

2.1 Number of pleasure trips in past 3 years

The very strong travel orientation of the sample was reflected in the fact that 90% of respondents had taken a pleasure trip of at least four nights in the past three years, with 83% having taken such a trip by plane.

(Reference: Table 3A)

Of the respondents who had taken a pleasure trip of four nights or more, the majority (74%) had taken more than one trip, with a mean of 3.7 pleasure trips of four nights or more. Of those who had taken a pleasure trip of four nights or more by plane, 50% had taken multiple plane trips, with a mean of 2.2 such trips.

(Reference: Table 3B)

TABLE 3A

PLEASURE TRIPS 4 NIGHTS OR MORE IN PAST 3 YEARS

	<u>By any mode of transportation</u>	<u>By plane</u>
Total respondents (100%)	1503 %	1503 %
Yes	90	83
No	10	17

TABLE 3B

NUMBER OF PLEASURE TRIPS 4 NIGHTS OR MORE TAKEN IN PAST 3 YEARS

	<u>By any mode of transportation</u>	<u>By plane</u>
Total respondents who took a trip (100%)	1348 %	1240 %
1	26	49
2	20	26
3	18	13
4	13	6
5 - 6	13	3
7 or more	11	4
Mean	<u>3.7</u>	<u>2.2</u>

Pleasure trips were defined as either short haul (i.e. to places in Australia) or long haul (i.e. to destinations elsewhere)

Of the respondents who had taken a pleasure trip of four nights or more by plane in the past three years, 36% had traveled in Australia i.e. had taken a short haul trip. A total of 93% had traveled to somewhere outside Australia i.e. had taken a long haul trip.

(Reference: Table 4A)

About one-third (34%) of travelers who had visited a long haul destination by plane had taken more than one such trip in the past 3 years. The mean was 1.6 long haul trips.

(Reference: Table 4B)

TABLE 4A

WHERE TAKEN ANY PLEASURE TRIPS 4 NIGHTS
OR MORE IN PAST 3 YEARS BY PLANE

	<u>BY PLANE TO PLACES:</u>	
	<u>In</u> <u>Australia</u>	<u>Outside of</u> <u>Australia</u>
Total respondents who took plane trip (100%)	1240	1240
	%	%
Yes	36	93
No	64	7

TABLE 4B

NUMBER OF PLEASURE TRIPS 4 NIGHTS
OR MORE TAKEN IN PAST 3 YEARS
BY PLANE

	<u>BY PLANE TO PLACES:</u>	
	<u>In</u> <u>Australia</u>	<u>Outside of</u> <u>Australia</u>
Total respondents who took pleasure trips 4+ nights by plane to that destination (100%)	447	1158
	%	%
1	54	66
2	23	21
3 or more	24	13
	46 34	
Mean	<u>2.3</u>	<u>1.6</u>

In the context of the total sample, then, it can be seen that 77% of respondents had taken a pleasure trip of four nights or more by plane outside Australia in the past three years i.e. had taken a long haul trip. This means that 23% of respondents were in the sample by virtue of the fact that they intended to take such a trip in the next two years.

(Reference: Table 5)

TABLE 5

PLEASURE TRIPS 4 NIGHTS OR MORE
IN THE PAST 3 YEARS
BY PLANE OUTSIDE AUSTRALIA

Total respondents (100%)	1503
	%
Yes	77
No	23

2.2 Destination of two most recent trips

Respondents who had traveled on a long haul trip were asked to what destinations they had been on their most and second most recent pleasure trips in the past three years.

The most popular destinations visited on long haul trips were Europe (37%) and Asia (36%). The U.S. was next in line at 19%, including 16% who visited the mainland and 8% who visited Hawaii/Guam/Samoa. From the level of duplication it is evident that many of the travelers who visited Hawaii/Guam/Samoa did so as a stopover on a trip to the U.S. mainland.

Canada was visited by only 7% of long haul travelers.

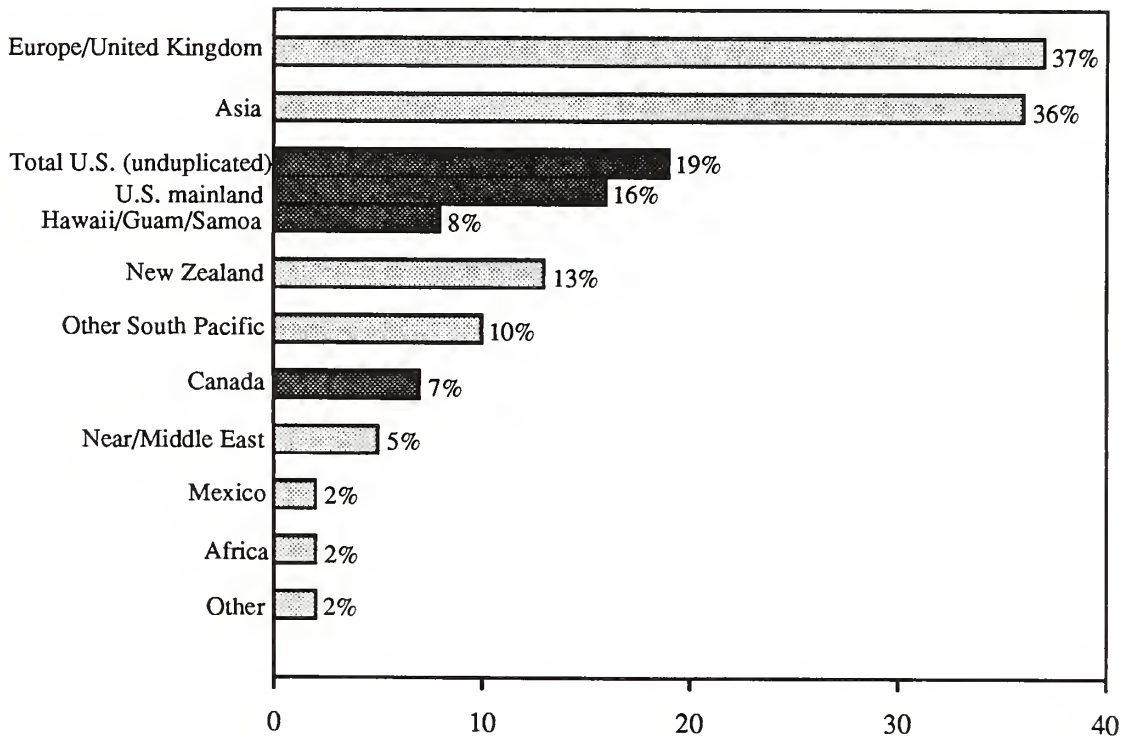
(Reference: Figure 1)

Apart from a slight tendency for travelers to the U.S. to be more likely to originate from Melbourne, there were no particular demographic characteristics that distinguished travelers to Canada or the U.S. mainland from travelers to other destinations. This lack of differentiation by demographics makes the attitudinal segmentation described later in this report all the more important. Visitors to Hawaii/Guam/Samoa, however, were somewhat differentiated by being less likely than average to be married, and more likely than average to be in a sales/clerical occupation, from Sydney, and high school educated.

(Reference: Table 6)

FIGURE 1

DESTINATION OF TWO MOST RECENT LONG HAUL TRIPS IN PAST 3 YEARS*



* Based on 1,548 trips comprised of 1,158 most recent trips and 390 second most recent trips.

TABLE 6

DEMOGRAPHICS OF VISITORS TO KEY DESTINATIONS

		DESTINATION VISITED*				
		Canada	U.S.			Other
	Total		U.S. total	Main-land	Hawaii/ Guam/ Samoa	
Total respondents (100%)	1503	89	225	194	93	1042
	%	%	%	%	%	%
<u>Sex</u>						
Male	49	46	46	49	40	49
Female	51	54	54	51	60	51
<u>Age</u>						
18 - 24 years	13	9	10	10	13	11
25 - 34 years	23	20	23	23	20	23
35 - 44 years	22	23	22	21	28	21
45 - 54 years	17	16	16	16	14	18
55 - 64 years	15	20	19	20	17	15
65 years or over	11	13	11	10	8	12
<u>Marital status</u>						
Single	22	20	25	26	26	19
Married	66	64	61	61	(55)	69
Living together	2	2	1	1	3	2
Divorced/separated/widowed	10	14	13	12	16	10
<u>Occupation</u>						
Owner	4	4	5	6	4	4
Manager/executive	7	11	9	9	12	7
Professional/technical	20	17	17	19	13	20
Clerical/sales	17	18	20	19	(27)	17
Skilled worker	12	9	9	10	7	11
Unskilled worker	5	5	6	6	10	4
Student	5	4	4	3	4	4
Retired	13	13	13	14	8	13
Homemaker	16	18	15	13	14	17
Other	1	1	1	1	2	1
<u>City</u>						
Sydney	40	42	39	35	(50)	40
Melbourne	29	29	35	(37)	26	28
Brisbane	10	10	9	9	10	10
Adelaide	9	15	12	13	10	9
Perth	11	5	5	6	5	13

* On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

Note: Circled numbers represent those referred to in the main text

TABLE 6 (cont'd)

DEMOGRAPHICS OF VISITORS TO KEY DESTINATIONS

	<u>Total</u>	<u>DESTINATION VISITED*</u>				
		<u>Canada</u>	<u>U.S.</u>			<u>Other</u>
			<u>U.S. total</u>	<u>Main-land</u>	<u>Hawaii/ Guam/ Samoa</u>	
Total respondents (100%)	1503	89	225	194	93	1042
	%	%	%	%	%	%
<u>Education</u>						
Primary	5	-	3	3	2	4
Secondary/high school	46	42	50	46	62	45
Technical/commercial	27	27	25	27	19	28
University/post graduate	23	31	22	27	19	23
<u>Life cycle</u>						
Living alone	10	10	13	14	12	10
Living with one adult	30	37	33	33	28	32
Single with children	7	8	7	7	9	6
Couple with children	33	28	27	27	27	33
Other	21	18	21	21	25	20
<u>Living arrangement</u>						
Live alone	10	10	13	14	13	10
Living with children	41	36	35	36	37	40
Living without children	49	54	52	50	51	50
<u>Mean no. of adults 18 years or over</u>	<u>2.4</u>	<u>2.2</u>	<u>2.3</u>	<u>2.3</u>	<u>2.4</u>	<u>2.4</u>
<u>Whether any children under 18 years in household</u>						
Yes	41	36	35	36	37	35
No	59	64	65	64	63	65
<u>Household income in Australian dollars (1987/88 financial year)</u>						
Under \$20,000	16	15	17	17	13	17
\$20,000 - 29,999	16	15	14	11	14	15
\$30,000 - 39,999	16	14	16	14	17	16
\$40,000 - 49,999	13	8	10	10	10	14
\$50,000+	24	30	28	30	32	24
Refused	15	18	14	17	13	15

* On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

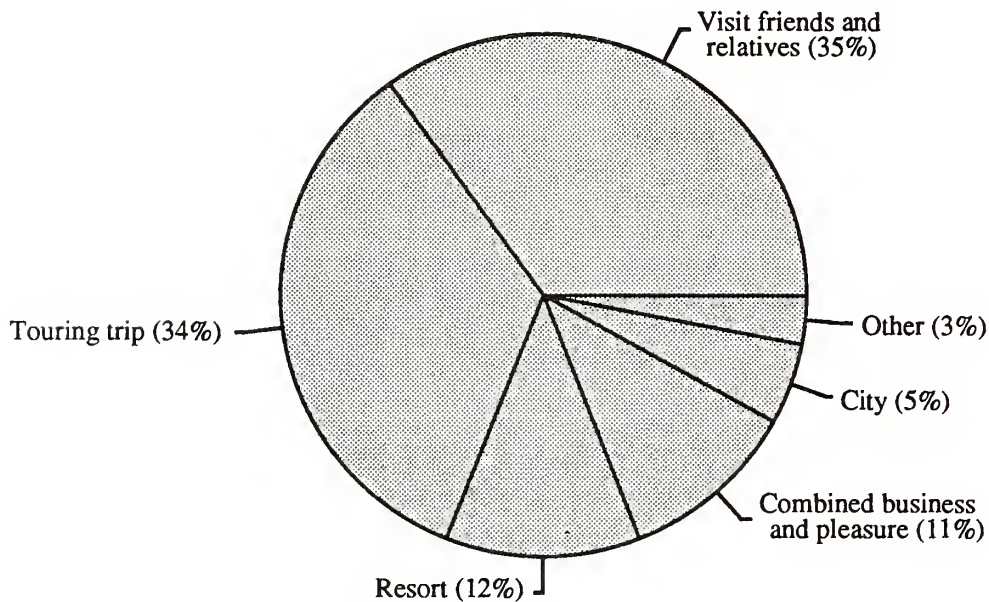
2.3 Type of two most recent trips

When asked what type of trip they had taken on their most and second most recent trips to any long haul destination, the most frequent mentions given by respondents were trips to visit friends and relatives (35%) and touring trips (34%). The next most common types were resort trips (12%) and business/pleasure trips (11%). A variety of other trip types received relatively fewer mentions.

(Reference: Figure 2)

FIGURE 2

**TYPE OF TWO MOST RECENT
LONG HAUL TRIPS***



* Based on 1,548 trips comprised of 1,158 most recent trips and 390 second most recent trips.

Note: For full descriptions of the trip types discussed in this section see Card A in Appendix II.

The incidence of touring trips was about the same for trips to Canada and the U.S. as compared with "other" destinations. A trip to Canada, however, was somewhat more likely to be to visit friends and relatives (44%), and less likely to be a resort trip (3%), than was a trip elsewhere. A trip to the U.S. mainland was comparatively more likely to be a combined business and pleasure trip (18%), and a trip to Hawaii/Guam/Samoa was comparatively more likely to be a resort trip (17%).

(Reference: Table 7)

TABLE 7

TYPE OF LONG HAUL TRIP*

	<u>Total</u>	<u>DESTINATION**</u>				
		<u>Canada</u>	<u>U.S.</u>			<u>Other</u>
			<u>U.S. total</u>	<u>Main-land</u>	<u>Hawaii/Guam/Samoa</u>	
Total trips taken by respondents (100%)	1548	108	294	250	125	1372
	%	%	%	%	%	%
Visit friends and relatives	35	44	33	36	26	35
Touring trip	34	33	35	35	38	34
Resort	12	3	10	6	17	12
Combined business and pleasure	11	16	17	18	13	11
City	5	2	2	2	2	5
Outdoor trip	1	1	-	-	-	1
Exhibition, special event or theme park	1	2	2	2	2	1
Cruise	1	-	1	1	2	1

* Total most and second most recent trip

** On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

2.4 Mode of transportation used within Canada and mainland U.S.

Respondents who had visited either Canada or the U.S. were asked which modes of transportation they used within the country on their trip.

Plane was the most popular mode of transportation used, although more so in the U.S. (78%) than in Canada (48%).

Rented car, inter-city bus, and train were about equally popular in Canada (24%, 26% and 25% respectively), but train was definitely the least popular of these particular modes in the U.S. (41%, 36% and only 19% respectively).

(Reference: Table 8)

TABLE 8

MODE OF TRANSPORTATION USED WITHIN CANADA AND MAINLAND U.S.*

	<u>Canada</u>	Mainland <u>U.S.</u>
Total trips taken by respondents (100%)	108	250
	%	%
Plane	48	78
Rented car	24	41
Bus (between cities)	26	36
Public transportation (within cities)	26	33
Private car	37	29
Train	25	19
Boat	12	7
Camper or RV	4	2

* Total most and second most recent trip

2.5 Number of nights away

Detailed trip characteristics were obtained about the long haul trips taken by respondents in the past three years i.e. about the pleasure trips by plane lasting four nights or more to destinations outside of Australia. Respondents who had taken only one such trip were asked about that trip; those who had taken two or more such trips were asked about either their most recent or their second most recent trip on a random basis.

The average duration of these long haul trips was a generous 51.7 nights. About half (48%) of the trips lasted 30 or more nights. These figures are very high by international standards, and suggest an important feature of the Australian travel market.

Trips that included Canada and the mainland U.S. as destinations were particularly long, lasting an average of 89.9 and 65.8 nights respectively. It should be noted that these latter averages refer to the total length of the trip, and not necessarily to the number of nights actually spent in Canada and the U.S.

(Reference: Table 9)

TABLE 9

NUMBER OF NIGHTS AWAY ON LONG HAUL TRIP*

		<u>TRIPS THAT INCLUDED:**</u>				
		<u>Canada</u>	<u>U.S.</u>			<u>Other</u>
	<u>Total</u>		<u>U.S. total</u>	<u>Main-land</u>	<u>Hawaii/Guam/Samoa</u>	
Total respondents took long haul trip (100%)	1158	89	225	194	93	1042
	%	%	%	%	%	%
4 - 6 nights	3	-	2	2	2	2
7 - 9 nights	8	1	3	2	7	8
10 - 16 nights	23	8	15	11	24	23
17 - 29 nights	18	19	25	25	29	17
30 - 59 nights	25 ⁴⁸	32 ⁷²	27 ⁵⁵	30 ⁶¹	19 ³⁸	25 ⁴⁹
60 or more nights	23	40	28	31	20	24
Mean ⁺	<u>51.7</u>	<u>89.9</u>	<u>61.1</u>	<u>65.8</u>	<u>55.0</u>	<u>52.0</u>

* Outside Australia

** On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

+ The mean reflects the length of stay of the entire trip, not necessarily the number of nights spent in Canada or the U.S.

2.6 Month of departure

Travel was distributed more or less evenly throughout the year, with only a small bulge occurring in the North American summer months of June, July and August. (These months, of course, correspond to the Australian winter season.)

Summer was the most popular time of year to visit Canada (40%) and the mainland U.S. (36%). Travel to Hawaii/Guam/Samoa was generally uniform throughout the year, although it was slightly lower during winter (i.e. Australian summer).

(Reference: Table 10)

TABLE 10

MONTH LONG HAUL TRIP WAS STARTED*

	<u>Total</u>	<u>DESTINATION**</u>				
		<u>Canada</u>	<u>U.S.</u>			<u>Other</u>
			<u>U.S. total</u>	<u>Main-land</u>	<u>Hawaii/Guam/Samoa</u>	
Total respondents took long haul trip (100%)	1158	89	225	194	93	1042
	%	%	%	%	%	%
<u>Winter (Summer)</u>	(21)	(16)	(15)	(16)	(18)	(22)
December	9	7	5	5	7	9
January	7	6	5	5	7	7
February	6	3	5	6	5	6
<u>Spring (Fall)</u>	(24)	(26)	(25)	(26)	(29)	(24)
March	7	6	6	6	10	7
April	9	11	10	11	12	9
May	8	9	9	9	8	8
<u>Summer (Winter)</u>	(31)	(40)	(36)	(36)	(26)	(30)
June	13	15	15	15	12	13
July	10	13	13	14	9	10
August	7	13	8	8	5	7
<u>Fall (Spring)</u>	(24)	(18)	(24)	(22)	(27)	(23)
September	11	10	13	12	14	11
October	6	5	6	5	10	5
November	7	3	5	5	3	7

* Australian seasons in brackets

** On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

2.7 Traveling party

Among travel parties that did not include children under 18 years, the mean number of members was 2.4. Parties that included children were much larger with 4.3 members on average. Parties traveling to Hawaii/Guam/Samoa appeared to be somewhat larger than parties traveling to other destinations, but the base sizes involved were too small to be conclusive in this regard.

(Reference: Table 11A)

Only 20% of long haul travelers went on their trip by themselves, while 55% went with their wife/husband/girl friend/boy friend. Children (19%) and friends (13%) were the next most frequently mentioned traveling partners.

(Reference: Figure 3 and Table 11B)

TABLE 11A

NUMBER OF PEOPLE IN IMMEDIATE TRAVEL PARTY

		DESTINATION*				
		Canada	U.S.			Other
					Hawaii/ Guam/ Samoa	
	Total		U.S. total	Main- land		
<u>Parties without children under 18 years</u>						
Total respondents took long haul trip without children (100%)	889	71	173	151	69	800
	%	%	%	%	%	%
1	26	26	27	29	18	26
2	53	61	55	53	59	53
3 or more	21	13	18	17	24	21
Mean	<u>2.4</u>	<u>2.1</u>	<u>2.2</u>	<u>2.2</u>	<u>2.5</u>	<u>2.4</u>
<u>Parties with children under 18 years</u>						
Total respondents took long haul trip with children (100%)	268	18+	52	43	24+	241
	%	%	%	%	%	%
1	-	-	-	-	-	-
2	17	11	12	9	8	18
3	23	28	21	21	21	24
4	29	33	35	37	33	28
5 or more	31	28	33	33	38	30
Mean	<u>4.3</u>	<u>4.1</u>	<u>4.5</u>	<u>4.5</u>	<u>5.0</u>	<u>4.2</u>

* On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

+ Note: small base

FIGURE 3

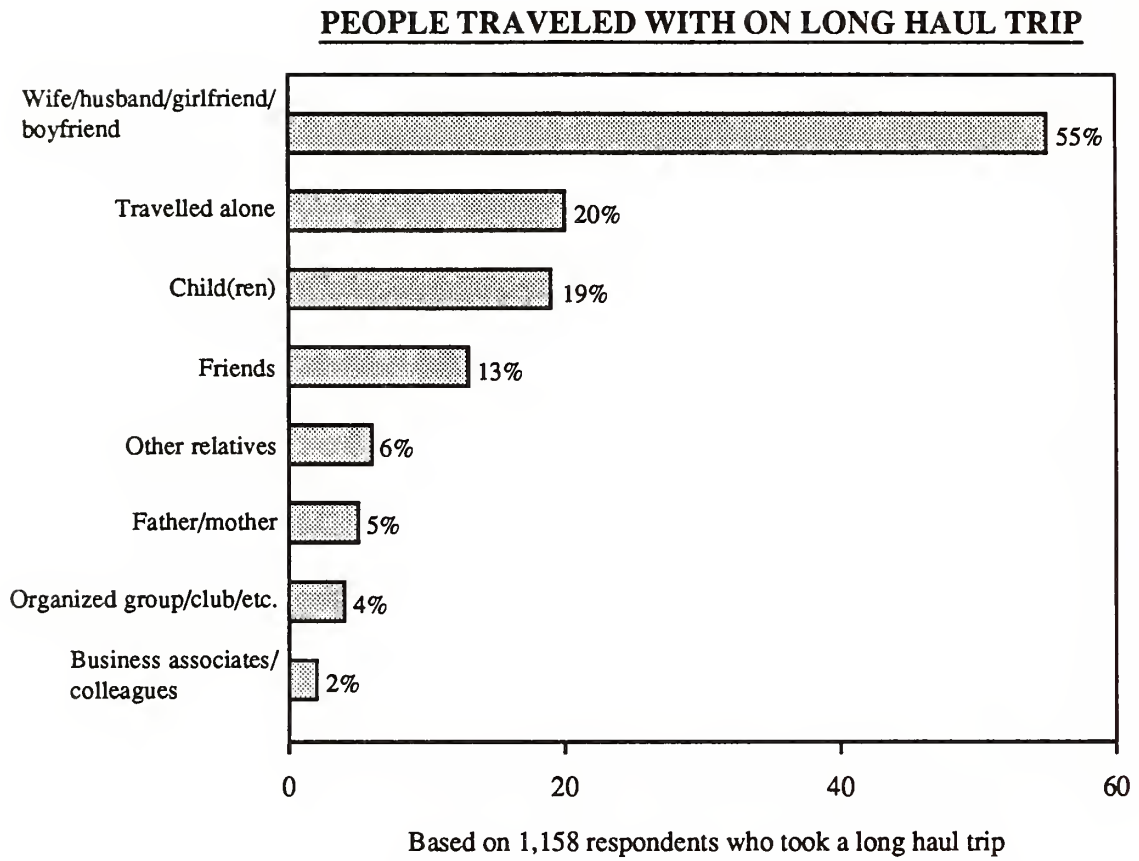


TABLE 11B

PEOPLE TRAVELED WITH ON LONG HAUL TRIP

	<u>Total</u>	<u>DESTINATION*</u>				
		<u>Canada</u>	<u>U.S.</u>			<u>Other</u>
			<u>U.S. total</u>	<u>Main-land</u>	<u>Hawaii/ Guam/ Samoa</u>	
Total respondents took long haul trip (100%)	1158	89	225	194	93	1042
	%	%	%	%	%	%
Wife/husband/girl friend/boy friend	55	58	56	55	55	56
Traveled alone	20	20	21	23	13	20
Child(ren)	19	19	19	18	18	19
Friends	13	12	14	12	22	12
Other relatives	6	8	7	7	10	6
Father/mother	5	7	4	5	4	5
Organized group/club/etc.	4	5	4	4	7	4
Business associates/colleagues	2	2	4	3	7	2

* On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

2.8 How long before leaving was destination decided and trip booked

For just under half (44%) of all long haul trips the decision to go was made within 3 months of departure.

The mean lead time was 5.9 months, with the figure being slightly higher among travelers to Canada (7.4 months) than among those who visited the U.S. and other destinations.

(Reference: Table 12A)

TABLE 12A

NUMBER OF MONTHS BEFORE LEAVING WAS DESTINATION DECIDED

	<u>Total</u>	<u>DESTINATION*</u>				
		<u>Canada</u>	<u>U.S.</u>			<u>Other</u>
			<u>U.S. total</u>	<u>Main-land</u>	<u>Hawaii/ Guam/ Samoa</u>	
Total respondents took long haul trip (100%)	1158	89	225	194	93	1042
	%	%	%	%	%	%
1 month or less	17	11	14	14	10	18
Over 1 month to 2 months	16 44	17 38	14 40	12 38	18 39	14 45
Over 2 months to 3 months	11	10	12	12	11	12
Over 3 months to 4 months	6	7	7	6	13	6
Over 4 months to 5 months	3	5	5	6	2	3
Over 5 months to 6 months	20	14	18	19	15	20
Over 6 months to 7 months	1	2	2	2	3	1
Over 7 months to 8 months	3	1	2	2	2	3
Over 8 months to 9 months	3	6	3	4	2	3
Over 9 months to 12 months	14	16	17	19	16	14
Over 12 months	6	12	6	6	8	6
Mean	<u>5.9</u>	<u>7.4</u>	<u>6.1</u>	<u>6.3</u>	<u>6.2</u>	<u>5.9</u>

* On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

In terms of actually booking the trip, the lead time involved was much shorter. The mean was 3.0 months.

(Reference: Table 12B)

TABLE 12B

NUMBER OF MONTHS BEFORE LEAVING
WAS TRIP BOOKED

	<u>Total</u>	<u>DESTINATION*</u>				<u>Other</u>
		<u>Canada</u>	<u>U.S.</u>		<u>Hawaii/ Guam/ Samoa</u>	
			<u>U.S. total</u>	<u>Main- land</u>		
Total respondents took long haul trip (100%)	1158	89	225	194	93	1042
	%	%	%	%	%	%
½ month or less	12	9	9	8	5	12
Over ½ month to 1 month	17	11	16	15	15	18
Over 1 month to 2 months	22	25	24	22	28	22
Over 2 months to 3 months	16	19	17	19	16	16
Over 3 months to 4 months	9	9	10	10	11	9
Over 4 months to 5 months	5	9	7	7	5	5
Over 5 months to 6 months	13	14	13	13	16	13
Over 6 months	6	5	5	6	3	6
Mean	<u>3.0</u>	<u>3.3</u>	<u>3.1</u>	<u>3.3</u>	<u>3.1</u>	<u>3.0</u>

* On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

2.9 Sources of information used in planning

A variety of sources were used by long haul travelers in planning their trips, with an average of 2.3 mentions given per respondent. The most frequent mentions were a travel agent (69%), followed by friends/family (44%) and brochures/pamphlets (41%). Other sources were used to a much lesser extent.

The strong influence of travel agents was evident from the 45% who named them as the single most important source of planning information. Friends/family were a distant second at 20%, with no other sources receiving significant levels of mentions. These results strongly indicate how important it is to keep travel agents well informed and stocked with product possibilities.

(Reference: Table 13A)

TABLE 13A

SOURCES OF INFORMATION USED IN PLANNING A LONG HAUL TRIP

	<u>Sources used</u>	<u>Most important source used</u>
Total respondents took long haul trip (100%)	1158	1158
	%	%
Travel agent	69	45
Friends/family	44	20
Brochures/pamphlets	41	9
Newspaper/magazine articles	17	2
Airline	15	6
Books/library	9	2
Advertisements	8	1
Tour operator/company	5	1
Government tourism office/board	5	1
Embassy/consulate	4	*
Clubs/associations	4	2
Automobile associations	2	*
Other	6	4
None	5	6
Mean number of sources used	<u>2.3</u>	

* Less than 0.5%

The information sources used by travelers to Canada and the U.S. were basically the same as those used by travelers to other destinations.

(Reference: Table 13B)

TABLE 13B

MOST IMPORTANT SOURCES OF INFORMATION USED
IN PLANNING A LONG HAUL TRIP

	<u>Total</u>	<u>DESTINATION**</u>				
		<u>Canada</u>	<u>U.S.</u>			<u>Other</u>
			<u>U.S.</u> <u>total</u>	<u>Main-</u> <u>land</u>	<u>Hawaii/</u> <u>Guam/</u> <u>Samoa</u>	
Total respondents took long haul trip (100%)	1158	89	225	194	93	1042
	%	%	%	%	%	%
Travel agent	45	43	48	49	46	45
Friends/family	20	17	14	14	18	21
Brochures/pamphlets	9	10	10	9	10	8
Airline	6	12	5	5	7	6
Books/library	2	2	2	3	-	2
Newspaper/magazine articles	2	1	2	1	3	2
Clubs/associations	2	1	1	2	-	2
Tour operator/company	1	1	3	2	4	1
Government tourism office/board	1	1	1	2	1	1
Advertisements	1	1	2	2	1	1
Embassy/consulate	*	2	1	1	-	*
Automobile association	*	1	1	1	1	*
Other	4	6	5	5	4	4
None	6	2	6	6	6	6

* Less than 0.5%

** On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

2.10 Whether a package trip

The most common type of trip (taken by 51% of long haul travelers) was an independent trip i.e. a trip that included neither a flight/accommodation package nor a guided tour.

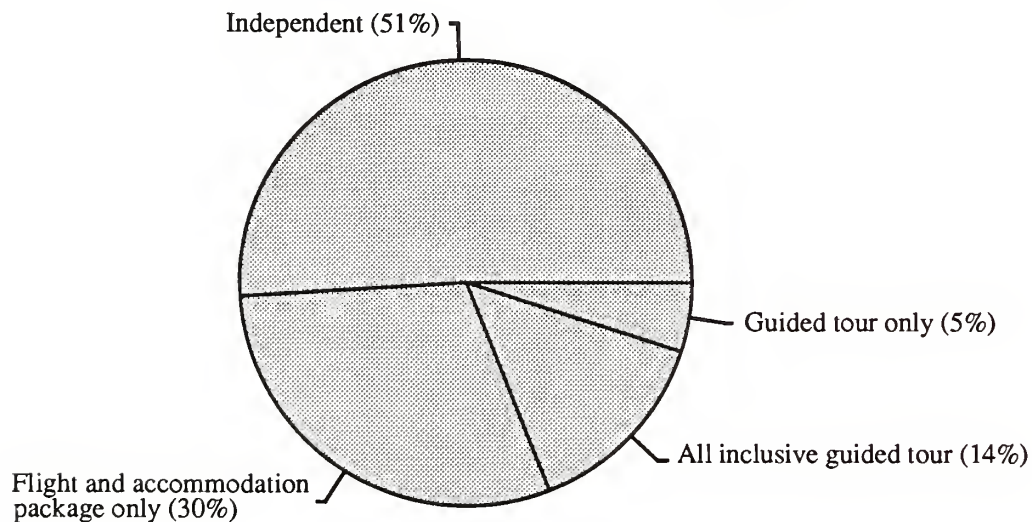
All-inclusive guided tours (i.e. package tours that included flight and accommodation as well as a planned guided tour) were taken by 14% of travelers. Flight and accommodation packages (with no guided tour) were somewhat more popular (30%), while guided tours (with no flight and accommodation package) were the least common of all (5%).

Independent travel was proportionately more frequent among trips to Canada and the U.S. mainland than it was among trips to other destinations. Package travel was proportionately more frequent among trips to Hawaii/Guam/Samoa.

(Reference: Figure 4 and Table 14)

FIGURE 4

TYPE OF LONG HAUL TRIP



Based on 1,158 respondents who took a long haul trip

TABLE 14

TYPE OF LONG HAUL TRIP

		DESTINATION*				
		<u>Canada</u>	<u>U.S.</u>			<u>Other</u>
	<u>Total</u>		<u>U.S. total</u>	<u>Main- land</u>	<u>Hawaii/ Guam/ Samoa</u>	
Total respondents took long haul trip (100%)	1158	89	225	194	93	1042
	%	%	%	%	%	%
All-inclusive guided tour (flight and accommodation and guided tour)	14	9	11	11	15	14
Flight and accommodation package only	30	15	26	22	37	30
Guided tour only	5	6	6	7	5	5
Independent	51	71	57	60	43	51

* On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

2.11 Where booked

Nearly all (90%) of the flight and accommodation packages (which may or may not have included a guided tour) were booked with travel agents.

(Reference: Table 15)

Of the travelers who took a guided tour (which may or may not have included a flight and accommodation package), 78% booked through a travel agent and 12% booked through a tour or holiday company. Booking through a tour or holiday company was more frequent among trips to Canada (23%) and the U.S. (27%) than among trips elsewhere (11%).

(Reference: Table 16)

Respondents who had not taken a flight/accommodation package were asked separately where they had booked their flight and where they had booked their accommodation.

In terms of the flight, over three-quarters (76%) booked through a travel agent, and most of the rest (19%) booked directly with the airline.

For accommodation, the proportion using a travel agent was only 31%, as a total of 49% had stayed with friends or relatives. Of the remaining respondents, 20% did not book in advance, and 17% booked with the hotel directly.

(Reference: Table 17)

A summary of unduplicated mentions of booking sources confirms the pattern that is already apparent i.e. that the great majority (86%) of all respondents used a travel agent to book at least part of their holiday. A total of 14% of travelers booked their trip (or part of their trip) through an airline, and 11% through a hotel.

(Reference: Table 18)

TABLE 15

WHERE FLIGHT AND ACCOMMODATION PACKAGE
WAS BOOKED

	<u>Total</u>	<u>Canada</u>	<u>DESTINATION*</u>			<u>Other</u>
			<u>U.S.</u>	<u>Main-</u>	<u>Hawaii/</u>	
			<u>total</u>	<u>land</u>	<u>Guam/</u>	
					<u>Samoa</u>	
Total respondents took flight/accommodation package (100%)	503	21 ⁺	83	65	48	456
	%	%	%	%	%	%
Travel agent	90	86	87	86	85	90
Airline	7	10	11	11	10	7
Others	3	5	2	3	4	3

TABLE 16

WHERE GUIDED TOUR WAS BOOKED

	<u>Total</u>	<u>Canada</u>	<u>DESTINATION*</u>			<u>Other</u>
			<u>U.S.</u>	<u>Main-</u>	<u>Hawaii/</u>	
			<u>total</u>	<u>land</u>	<u>Guam/</u>	
					<u>Samoa</u>	
Total respondents took guided tour (100%)	217	13 ⁺	37 ⁺	35 ⁺	19 ⁺	198
	%	%	%	%	%	%
Travel agent	78	62	67	65	74	80
Tour company/holiday company	12	23	25	27	21	11
Airline	5	15	8	9	5	4
Others	6	-	3	3	5	6

+ Note: small base

* On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

TABLE 17

WHERE FLIGHT AND ACCOMMODATION FOR INDEPENDENT
TRIP WAS BOOKED

		DESTINATION*				
		Canada	U.S.			Other
	<u>Total</u>		<u>U.S. total</u>	<u>Main- land</u>	<u>Hawaii/ Guam/ Samoa</u>	
Total respondents took independent long haul trip (100%)	655	68	142	129	45	586
	%	%	%	%	%	%
<u>Flight (to destination only)</u>						
Travel agent	79	75	76	77	71	81
Airline directly	19	25	22	20	27	17
Other	2	-	2	2	2	2
<u>Accommodation (can be more than one)</u>						
Stayed with friends/relatives	49	45	34	32	33	50
Travel agent	31	34	47	49	49	31
Hotel directly	17	28	26	27	27	17
Other	2	2	4	4	7	2
Did not book in advance	20	25	19	19	22	21

TABLE 18

WHERE COMPONENTS OF LONG HAUL TRIP WERE BOOKED

(Total unduplicated mentions)

		DESTINATION*				
		Canada	U.S.			Other
	<u>Total</u>		<u>U.S. total</u>	<u>Main- land</u>	<u>Hawaii/ Guam/ Samoa</u>	
Total respondents took long haul trip (100%)	1158	89	225	194	93	1042
	%	%	%	%	%	%
Travel agent	86	82	84	85	82	86
Airline	14	21	18	17	18	13
Direct with hotel etc.	10	21	17	18	13	9
Tour company/holiday company	2	3	4	5	4	2

* On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

2.12 Activities taken part in

Respondents were shown a list of 38 activities that people might participate in during a holiday, and were asked to name the ones that they had actually taken part in on their trip.

The overall answers were somewhat predictable as the most frequent mentions were such activities as shopping (91%), dining out in restaurants (88%), taking pictures/filming (88%), sightseeing in cities (86%), and sampling local foods (85%). Of more interest were the activities participated in by those going to either Canada or the U.S. The following are examples of comparatively higher mentions for each destination.

- | | |
|-------------------------------|---|
| <u>Canada</u> | <ul style="list-style-type: none">- Touring the countryside (96%)- Visiting scenic landmarks (85%)- Visiting national parks or forests (76%)- Visiting mountainous areas (73%)- Visiting friends or relatives (73%)- Visiting galleries/museums (71%)- Visiting sites commemorating important people (70%)- Visiting wilderness areas (67%)- Visiting amusement or theme parks (54%)- Observing wildlife/bird watching (38%)- Snow skiing (15%) |
| <u>U.S. mainland</u> | <ul style="list-style-type: none">- Visiting friends or relatives (67%)- Visiting sites commemorating important people (64%)- Visiting amusement or theme parks (61%)- Attending concerts/live theatre (50%)- Visiting wilderness areas (47%)- Visiting places of importance in military history (45%)- Visiting casinos/gambling (34%)- Attending sporting events (30%) |
| <u>Hawaii/Guam/
Samoa</u> | <ul style="list-style-type: none">- Visiting scenic landmarks (82%)- Visiting seaside (80%)- Going on short guided excursions or tours (74%)- Swimming (71%)- Sunbathing or other beach activities (70%)- Visiting sites commemorating important people (67%)- Visiting amusement or theme parks (58%)- Visiting nightclubs, etc. (55%)- Visiting places of importance in military history (51%)- Attending concerts/live theatre (50%)- Water sports (41%)- Visiting casinos/gambling (30%) |

Overall, it seems that while some tourist activities are universal regardless of destination, travelers take advantage of:

- Scenery, outdoor activities and skiing especially in Canada
- Entertainment and sightseeing in the U.S.
- Seaside and entertainment activities in Hawaii/Guam/Samoa

(Reference: Table 19)

TABLE 19

ACTIVITIES TAKEN PART IN DURING LONG HAUL TRIP

	<u>Total</u>	<u>DESTINATION*</u>				<u>Other</u>
		<u>Canada</u>	<u>U.S. total</u>	<u>Main-land</u>	<u>Hawaii/ Guam/ Samoa</u>	
Total respondents took long haul trip (100%)	1158	89	225	194	93	1042
	%	%	%	%	%	%
Shopping	91	95	92	90	96	91
Dining out in restaurants	88	92	92	92	91	87
Taking pictures/filming	88	88	91	90	94	87
Sightseeing in cities	86	93	92	92	91	85
Sampling local foods	85	88	85	85	85	85
Touring the countryside	82	96	85	84	83	82
Visiting scenic landmarks	73	85	75	74	82	73
Visiting places of historic interest	73	81	75	75	75	74
Getting to know the local inhabitants	67	75	64	66	57	68
Visiting the seaside	64	61	68	66	80	63
Going on short guided excursions or tours	60	65	62	62	74	60
Visiting mountainous areas	59	73	64	64	63	59
Visiting galleries/museums	57	71	63	65	58	57
Visiting friends or relatives	57	73	62	67	46	58
Visiting national parks or forests	53	76	62	62	59	51
Visiting sites commemorating important people	51	70	64	64	67	50
Swimming	46	43	54	50	71	45
Attending local festivals/fairs/special events	46	54	43	43	39	47

* On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

Note: Circled numbers represent those referred to in the main text

TABLE 19 (cont'd)

ACTIVITIES TAKEN PART IN DURING LONG HAUL TRIP

		DESTINATION*				
		Canada	U.S.			Other
	<u>Total</u>		<u>U.S. total</u>	<u>Main-land</u>	<u>Hawaii/ Guam/ Samoa</u>	
Total respondents took long haul trip (100%)	1158	89	225	194	93	1042
	%	%	%	%	%	%
Visiting nightclubs, etc.	42	40	47	47	55	42
Sunbathing or other beach activities	40	44	51	46	70	38
Attending concerts/live theatre	40	49	48	50	50	40
Taking a day cruise	40	46	44	47	45	40
Visiting places of archeological interest	39	44	40	40	37	40
Visiting wilderness areas	38	67	45	47	46	37
Visiting places of importance in military history	36	47	46	45	51	35
Visiting amusement or theme parks	33	54	58	61	58	31
Observing wildlife/bird watching	25	38	27	26	32	25
Climbing, hiking, etc.	22	24	21	21	24	22
Water sports	22	19	26	23	41	21
Attending sporting events	20	28	28	30	23	19
Visiting casinos/gambling	17	29	29	34	30	17
Golfing/tennis	14	20	16	16	18	14
Fishing	10	11	9	9	12	11
Taking a cruise of one or more nights	9	6	7	7	9	10
Visiting health spas	8	11	10	10	7	8
Horse riding	5	5	3	3	5	5
Snow skiing	5	15	6	6	7	5
Hunting	2	1	1	2	1	2

* On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

Note: Circled numbers represent those referred to in the main text

2.13 Satisfaction and likelihood of returning

Long haul travelers were well satisfied with their trips to all destinations. A total of 87% said that they were very satisfied, and a further 11% said that they were somewhat satisfied. Only 2% of the travelers felt they were not very satisfied. Over 90% of travelers to Canada and the U.S. were very satisfied.

(Reference: Table 20)

Overall, respondents seemed interested in returning to previously visited destinations. In total, 72% said they would be very or somewhat likely to return, including 48% who said they would be very likely to do so.

Interest in returning did not vary significantly by major destinations.

(Reference: Table 21)

TABLE 20

DEGREE OF SATISFACTION WITH LONG HAUL TRIP

		DESTINATION**					
		<u>Canada</u>	<u>U.S.</u>			<u>Other</u>	
					Hawaii/ Guam/ Samoa		
		<u>Total</u>		<u>U.S. total</u>	<u>Main- land</u>		
Total respondents took long haul trip (100%)		1158	89	225	194	93	1042
		%	%	%	%	%	%
Very satisfied	(X4)	87	95	91	90	93	86
Somewhat satisfied	(X3)	11	5	8	8	8	12
Not very satisfied	(X2)	2	-	1	1	-	2
Not at all satisfied	(X1)	*	-	*	1	-	*
Mean		3.8	4.0	3.9	3.9	3.9	3.8

* Less than 0.5%

** On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

TABLE 21

LIKELIHOOD OF RETURNING TO
SAME LONG HAUL DESTINATION

		DESTINATION*					
		<u>Canada</u>	<u>U.S.</u>			<u>Other</u>	
					Hawaii/ Guam/ Samoa		
		<u>Total</u>	<u>U.S. total</u>	<u>Main- land</u>			
Total respondents took long haul trip (100%)		1158	89	225	194	93	1042
		%	%	%	%	%	%
Very likely	(X4)	48	41	49	48	50	48
		72	65	72	71	74	72
Somewhat likely	(X3)	24	24	23	23	24	24
Not very likely	(X2)	16	18	18	19	18	16
Not at all likely	(X1)	12	17	10	10	9	12
Mean		3.1	2.9	3.1	3.1	3.1	3.1

* On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

3. LIKELY VACATION DESTINATIONS

3.1 Places would like to visit overseas (unaided)

Respondents were asked on an unaided basis to name five places overseas they would like to visit on a vacation trip, as well as the one place they would most like to visit in the next two years. These questions provided an indication of the level of interest in visiting Canada and the U.S. in the context of all destinations available to travelers.

With respect to the five top choices named, destinations in Europe received the most mentions (87%), followed by Asia (63%). The U.S. was mentioned by 55% of respondents, composed mostly of the mainland (50%) vs. Hawaii/Guam/Samoa (11%). Canada was next in line at 31%, exceeding even New Zealand which came in at 22%.

Although the actual figures involved were lower, responses for the one top choice destination followed a pattern similar to the above.

The rank order of destinations actually visited also followed a pattern similar to the above, with the exception of destinations in Asia, New Zealand, and the South Pacific. All of these destinations were visited more often than would be predicted by their "like to visit" rank order, presumably a result of their proximity to Australia.

This result suggests that "like to visit" does not necessarily mean "likely to visit". The data indicate, however, an interest in destinations yet to be visited.

(Reference: Table 22)

In terms of demographics, respondents who would most like to visit Canada were more likely to be older, married, and homemakers than were travelers to other destinations. Travelers to the U.S. mainland were more likely to be male and younger.

(Reference: Table 23)

TABLE 22

LONG HAUL DESTINATIONS WOULD LIKE TO VISIT

	Five top <u>choices</u> 1503	One top <u>choice</u> 1503	Actual destination of two most recent trips in past <u>3 years</u> 1548*
Total respondents (100%)	%	%	%
Europe/United Kingdom	87	41	37
Asia	63	20	36
U.S. total (unduplicated mentions)	(55)	(16)	(19)
Mainland (including Alaska)	50	14	16
Hawaii/Guam/Samoa	11	2	8
Canada	31	7	7
New Zealand	22	5	13
Africa	21	4	2
Central/South America	17	3	1
Other South Pacific	16	2	10
Near/Middle East	8	2	5
Mexico	3	**	2
West Indies/Caribbean	2	**	1

* Total trips taken by respondents

** Less than 0.5%

TABLE 23

KEY DESTINATIONS WOULD MOST LIKE TO VISIT
BY DEMOGRAPHICS

	<u>Total</u>	<u>WOULD MOST LIKE TO VISIT ...</u>				
		<u>Canada</u>	<u>U.S.</u>		<u>Other</u>	
			<u>U.S. total</u>	<u>Main-land</u>	<u>Hawaii/ Guam/ Samoa</u>	
Total respondents (100%)	1503 %	103 %	236 %	203 %	33* %	1158 %
<u>Sex</u>						
Male	49	43	60	(61)	52	46
Female	51	57	40	39	48	54
<u>Age</u>						
18 - 24 years	13	6	17	16	18	13
25 - 34 years	23	18	29	(31)	18	23
35 - 44 years	22	23	23	23	24	22
45 - 54 years	17	(19)	12	13	9	17
55 - 64 years	15	(18)	13	12	18	14
65 years or over	11	(16)	6	5	12	11
<u>Marital status</u>						
Single	22	8	26	27	21	22
Married	66	(78)	66	66	64	65
Living together	2	1	2	2	3	2
Divorced/separated/widowed	10	13	7	6	12	10
<u>Occupation</u>						
Owner	4	3	4	4	3	4
Manager/executive	7	8	6	6	6	7
Professional/technical	20	16	20	21	12	20
Clerical/sales	17	19	18	16	27	17
Skilled worker	12	11	17	18	9	11
Unskilled worker	5	5	7	7	9	5
Student	5	1	5	5	6	5
Retired	13	12	9	7	15	13
Homemaker	16	(24)	13	13	9	16
<u>City</u>						
Sydney	40	43	38	37	46	40
Melbourne	29	27	31	31	33	29
Brisbane	10	16	9	9	6	10
Adelaide	9	7	9	9	6	10
Perth	11	8	14	14	9	11

Note: Circled numbers represent those referred to in the main text

* Note: small base

TABLE 23 (cont'd)

KEY DESTINATIONS WOULD MOST LIKE TO VISIT
BY DEMOGRAPHICS

	<u>Total</u>	<u>WOULD MOST LIKE TO VISIT ...</u>				
		<u>Canada</u>	<u>U.S.</u>	<u>U.S.</u>	<u>Hawaii/</u> <u>Guam/</u> <u>Samoa</u>	<u>Other</u>
			<u>total</u>	<u>land</u>		
Total respondents (100%)	1503 %	103 %	236 %	203 %	33* %	1158 %
<u>Education</u>						
Primary	5	7	4	4	6	4
Technical/commercial	27	32	27	28	21	36
Secondary/high school	46	46	51	49	61	45
University/post graduate	23	15	18	19	21	15
<u>Life cycle</u>						
Live alone	10	8	8	6	15	11
Living with one adult	30	30	28	28	27	30
Single with children	7	4	9	8	9	7
Couple with children	33	35	36	38	27	32
Other	21	23	20	20	21	21
<u>Living arrangement</u>						
Live alone	10	8	8	6	15	11
Living with children	41	40	46	48	36	39
Living without children	49	52	46	46	49	50
<u>Mean no. of adults 18 years or over</u>	<u>2.4</u>	<u>2.5</u>	<u>2.4</u>	<u>2.4</u>	<u>2.4</u>	<u>2.4</u>
<u>Whether any children under 18 years in household</u>						
Yes	41	40	46	48	36	39
No	59	60	54	52	64	61
<u>Household income in Australian dollars (1987/88 financial year)</u>						
Under \$20,000	16	13	10	11	6	17
\$20,000 - 29,999	16	15	13	14	13	16
\$30,000 - 39,999	16	15	22	22	22	15
\$40,000 - 49,999	13	16	13	12	19	13
\$50,000+	24	26	25	26	22	23
Refused	16	16	16	16	19	16

Note: Circled numbers represent those referred to in the main text

* Note: small base

3.2 Likelihood of visiting place would most like to visit

Overall, 30% of respondents said that it was either definitely or very likely that they would travel in the next two years to the destination they named as the one they would most like to visit. A higher number (43%) said that it would be unlikely for them to do so. This may in part be a reflection of Australia's remoteness from such favoured destinations as Europe and North America.

The likelihood of traveling to the named destination was marginally lower among people who named Canada than it was among those who mentioned other places.

(Reference: Table 24)

TABLE 24

LIKELIHOOD OF VISITING THE ONE PLACE WOULD MOST LIKE TO VISIT

		WOULD MOST LIKE TO VISIT ...					
		Canada	U.S.			Other	
					Hawaii/ Guam/ Samoa		
		<u>Total</u>	<u>U.S. total</u>	<u>Main- land</u>			
Total respondents named a destination (100%)		1496	89	224	203	33*	705
		%	%	%	%	%	%
Definitely	(X5)	17	10	21	21	21	17
		30	22	33	33	30	30
Very likely	(X4)	13	12	12	12	9	13
Likely	(X3)	14	14	11	12	6	15
Might or might not	(X2)	13	14	14	13	21	13
Not likely	(X1)	43	51	42	41	42	42
Mean		<u>2.5</u>	<u>2.2</u>	<u>2.6</u>	<u>2.6</u>	<u>2.5</u>	<u>2.5</u>

* Note: small base

3.3 Places in U.S./Canada Australians might go on vacation

In order to obtain a measure of awareness of specific vacation destinations within Canada and the U.S., respondents were asked to name:

1. Five places that people might go on vacation (unaided)
2. Three other places that people might go on vacation (this time aided by a map)

The above questions were asked separately for Canada and the U.S.

In the data processing stage, answers were coded exactly as given by respondents and a full listing is available under separate cover. For the purposes of the main computer tables and this report, however, responses were grouped and reported for the following categories:

- Canada - 10 provinces and two territories
- Any specific location with 50 or more mentions
- U.S. - Top states
- 11 census divisions (see Appendix III)
- Eight travel regions (see Appendix III)
- Any specific location with 75 or more mentions

For example, answers grouped into "California" would include any mentions of California plus any mentions of Los Angeles, Yosemite National Park, Disneyland, and so on. A respondent naming both Los Angeles and San Francisco, though, would only count as one California mention.

A similar coding scheme was also followed for all of the remaining questions in this section of the report.

When asked on an unaided basis to name destinations in the U.S. and Canada to which people might go on a vacation, most respondents (99%) mentioned at least one place in the U.S., and at least one place in Canada (91%). On a total unaided and aided basis, virtually all respondents mentioned a place in both the U.S. and Canada.

(Reference: Table 25)

TABLE 25

WHETHER OR NOT RESPONDENT NAMED ANY PLACES
PEOPLE MIGHT GO ON A VACATION

	5 places people might go on vacation <u>(unaided)</u>	3 more places people might go on vacation <u>(aided)</u>	Total unaided and aided <u>mentions</u>
Total respondents (100%)	1503 %	1503 %	1503 %
<u>Canada</u>			
Yes	91	97	99
No	9	3	1
<u>U.S.</u>			
Yes	99	98	100
No	1	2	-

Specific results for awareness of vacation destinations were as follows:

- Canada - On an unaided basis, the most frequently named destinations were in Ontario (72%), British Columbia (68%), Quebec (67%) and Alberta (44%).

Specific destinations with the highest level of unaided mentions were Vancouver (48%) and Montreal (43%). Quebec City (33%), Toronto (31%), Niagara Falls (27%), and Calgary (27%) were the next most frequent mentions.

- On a total unaided and aided basis, destinations in British Columbia (85%), Ontario (84%), Quebec (83%), and Alberta (61%) continued to be the top mentions, followed by the Yukon (35%).

Specific destinations repeated essentially the same order as seen on an unaided basis, namely Vancouver (61%), Montreal (53%), Quebec City (46%), Niagara Falls (45%), Toronto (37%) and Calgary (36%).

(Reference: Table 26A)

U.S.

- On an unaided basis, mentions were heavily skewed towards destinations in California (91%) and New York (70%). The next most frequent mentions were destinations in Arizona (29%) and Florida (28%).

The main specific mentions in California were Disneyland (40%), Los Angeles (38%) and San Francisco (35%). The mentions of New York were largely attributable to mentions of New York City (61%). In Arizona, the main attraction was Grand Canyon National Park (26%).

On a total unaided and aided basis, almost all respondents (96%) mentioned at least one California destination. Also mentioned frequently were destinations in New York (80%), Florida (53%) and Arizona (45%).

The specific destinations mentioned most frequently followed the same pattern as seen on an unaided basis. In California, the top mentions were Disneyland (46%), Los Angeles (41%) and San Francisco (41%). Also important to their respective states were New York City (69%) and Grand Canyon National Park (34%).

(Reference: Table 26B)

TABLE 26A

VACATION DESTINATIONS IN CANADA - AWARENESS

	5 places people might go on vacation (unaided)	3 more places people might go on vacation (aided)	Total unaided and aided mentions
Total respondents mentioned a place (100%)	1368 %	1459 %	1495 %
<u>Provinces and Territories</u>			
Newfoundland/Labrador	7	18	24
P.E.I.	3	6	9
Nova Scotia	6	15	20
New Brunswick	1	2	3
Quebec	67	35	83
Ontario	72	47	84
Manitoba	7	9	15
Saskatchewan	5	11	14
Alberta	44	34	61
British Columbia	68	46	85
Yukon	9	29	35
Northwest Territories	5	8	12
<u>Specific Destinations</u>			
Vancouver	48	18	61
Montreal	43	14	53
Quebec City	33	17	46
Toronto	31	9	37
Niagara Falls	27	21	45
Calgary	25	13	36
Rocky Mountains	23	1	22
Banff National Park	15	6	20
Great Lakes	14	2	15
Ottawa	11	7	17
Vancouver Island	6	7	12
Winnipeg	5	5	10
Edmonton	5	6	11
Victoria	3	2	4
Jasper National Park	3	5	7
Klondike National Park	1	9	9
Queen Charlotte Island	-	5	5

TABLE 26B

VACATION DESTINATIONS IN THE U.S. - AWARENESS

	5 places people might go on vacation (unaided)	3 more places people might go on vacation (aided)	Total unaided and aided mentions
Total respondents mentioned a place (100%)	1485 %	1476 %	1500 %
<u>Top States</u>			
California	91	34	96
New York	70	16	80
Arizona	29	18	45
Florida	28	28	53
Washington D.C.	22	17	39
Texas	17	20	36
Nevada	17	11	27
Hawaii	15	7	21
Louisiana	13	10	23
Colorado	7	12	19
Illinois	7	3	10
Massachusetts	7	2	12
Washington	4	6	10
Pennsylvania	3	6	8
<u>8 Travel Regions</u>			
Travel South	44	52	75
Visit U.S. West	96	63	98
New England	12	10	20
Old West Trail Foundation	11	16	25
America's Heartland	16	18	32
Foremost West	42	43	69
George Washington Country	26	25	47
Great Lakes	11	9	19

* Less than 0.5%

TABLE 26B (cont'd)

VACATION DESTINATIONS IN THE U.S. - AWARENESS

	5 places people might go on vacation (unaided)	3 more places people might go on vacation (aided)	Total unaided and aided mentions
Total respondents mentioned a place (100%)	1485 %	1476 %	1500 %
<u>11 Census Divisions</u>			
West North Central	4	8	11
East South Central	4	11	14
New England	12	10	20
Middle Atlantic	71	21	82
Middle Atlantic (excluding New York)	4	6	9
East North Central	10	9	18
South Atlantic	49	50	78
South Atlantic (excluding Florida)	27	28	50
West South Central	30	32	54
Mountain	53	51	79
Pacific	93	46	98
Pacific (excluding California)	8	16	22
Pacific Islands	15	7	21
Atlantic Islands	*	*	*
<u>Specific Destinations</u>			
New York City	61	10	69
Disneyland	40	7	46
Los Angeles	38	4	41
San Francisco	35	6	41
Grand Canyon National Park	26	9	34
Las Vegas	15	5	20
New Orleans	12	7	19
Hollywood	9	1	10
Yellowstone National Park	9	8	16
Niagara Falls	8	5	13
Miami	7	4	11
Rockies	7	4	11
Chicago	6	3	9
Boston	6	5	11
Yosemite National Park	4	4	7
San Diego	4	2	6

* Less than 0.5%

3.4 Places in U.S./Canada ever visited and visited in past 3 years

Considering the long distances involved, a relatively high proportion of respondents had visited destinations in North America at some time. About one-third (34%) had been to the U.S. while 18% had been to Canada. The incidence of visitation in the past three years was somewhat lower at 17% for the U.S., and only 8% for Canada.

(Reference: Table 27)

Respondents were asked to name the places they had ever visited in Canada and the U.S., as well as those they had visited in the past three years. Not surprisingly the responses to these two questions tended to be correlated.

The comments that follow relate to the destinations visited in the past three years as these would presumably better reflect current tastes of Australian travelers:

Canada - Among respondents who had traveled to Canada in the past three years, the most popular destinations were in British Columbia (75%, mainly Vancouver). Next in line were Alberta (51%, mainly Banff National Park and Calgary), and Ontario (49%, mainly Toronto and Niagara Falls).

(Reference: Table 28A)

U.S. - The state most visited in the past three years was California (85%, mainly Los Angeles, San Francisco and Disneyland). New York (41%, mainly New York City) was the next most popular state, followed by Hawaii (25%).

(Reference: Table 28B)

TABLE 27

VISITED CANADA OR U.S. - EVER OR IN PAST THREE YEARS

	<u>Total</u>
Total respondents (100%)	1503
	%
<u>Canada</u>	
Ever visited	18
Visited in past three years	8
<u>U.S.</u>	
Ever visited	34
Visited in past three years	17

TABLE 28A

VACATION DESTINATIONS IN CANADA - WHETHER VISITED

	Ever visited	Visited in past 3 years
Total respondents visited Canada (100%)	266 %	117 %
<u>Provinces and Territories</u>		
Newfoundland/Labrador	4	2
P.E.I.	2	3
Nova Scotia	7	3
New Brunswick	4	1
Quebec	40	25
Ontario	57	49
Manitoba	5	1
Saskatchewan	6	4
Alberta	52	51
British Columbia	77	75
Yukon	4	2
Northwest Territories	2	-
<u>Specific Destinations</u>		
Vancouver	64	63
Banff National Park	38	33
Niagara Falls	35	27
Toronto	35	30
Montreal	33	17
Calgary	31	30
Vancouver Island	21	17
Rocky Mountains	17	18
Jasper National Park	16	18
Quebec City	15	12
Ottawa	10	9
Victoria	9	9
Edmonton	6	5

TABLE 28B

VACATION DESTINATIONS IN THE U.S. - WHETHER VISITED

	<u>Ever visited</u>	<u>Visited in past 3 years</u>
Total respondents visited the U.S. (100%)	508 %	250 %
<u>Top States</u>		
California	85	85
New York	52	41
Arizona	26	17
Nevada	25	21
Hawaii	24	25
Florida	22	14
Washington D.C.	19	13
Louisiana	15	9
Texas	13	10
Colorado	11	8
Washington	10	6
Illinois	10	8
Massachusetts	10	10
Pennsylvania	8	5
<u>8 Travel Regions</u>		
Travel South	39	26
Visit U.S. West	88	89
New England	16	13
Old West Trail Foundation	9	7
America's Heartland	18	12
Foremost West	38	27
George Washington Country	27	18
Great Lakes	17	13

* Less than 0.5%

TABLE 28B (cont'd)

VACATION DESTINATIONS IN THE U.S. - WHETHER VISITED

	<u>Ever visited</u>	<u>Visited in past 3 years</u>
Total respondents visited the U.S. (100%)	508 %	250 %
<u>11 Census Divisions</u>		
West North Central	7	7
East South Central	7	4
New England	16	13
Middle Atlantic	53	42
Middle Atlantic (excluding New York)	9	6
East North Central	16	13
South Atlantic	41	28
South Atlantic (excluding Florida)	27	19
West South Central	23	15
Mountain	47	36
Pacific	87	88
Pacific (excluding California)	14	33
Pacific Islands	24	-
Atlantic Islands	*	1
<u>Specific Destinations</u>		
San Francisco	45	37
New York City	44	34
Los Angeles	44	43
Disneyland	26	26
Grand Canyon National Park	19	12
Las Vegas	18	16
New Orleans	14	9
San Diego	10	10
Boston	9	9
Chicago	8	7
Niagara Falls	8	4
Yellowstone National Park	6	3
Yosemite National Park	6	4
Miami	5	2
Hollywood	4	4
Rockies	4	3
Dallas	3	3

3.5 Places in U.S./Canada most interested in visiting/revisiting

As another measure of vacation destinations in Canada and the U.S., respondents were asked to name the three places that they were most interested in visiting or revisiting. These questions were designed to provide an indication of the potential travel market to North America. Nearly all respondents named at least one place in Canada (96%) or the U.S. (97%) that they were interested in visiting.

(Reference: Table 29)

Although the first choice is also reported in the tables, the following figures relate to the three destinations of greatest interest:

Canada - The provinces which respondents were most interested in visiting or re-visiting were British Columbia (61%), Ontario (55%), Quebec (51%) and Alberta (35%). These figures indicate more interest in Quebec and less interest in Alberta than was reflected in the destinations actually visited in the past three years (cf. Table 28A).

B.C.'s strength came mainly from Vancouver (35%); Ontario's strength came primarily from Niagara Falls (27%) and Toronto (16%); Quebec's strength came from Montreal (27%) and Quebec City (21%).

(Reference: Table 30A)

U.S. - In terms of interest, California (71%) dominated all states, with New York (46%) in second place. These were also the states most likely to have been actually visited (see Table 28B).

New York City (38%) was the specific destination most likely to be named, followed by Disneyland (22%), San Francisco (18%), Los Angeles (18%), and Grand Canyon National Park (17%).

(Reference: Table 30B)

TABLE 29

WHETHER OR NOT NAMED ANY PLACES INTERESTED IN VISITING

Total respondents (100%)	1503
	%
<u>Canada</u>	
Yes	96
No	4
<u>U.S.</u>	
Yes	97
No	3

TABLE 30A

VACATION DESTINATIONS IN CANADA - INTEREST IN VISITING

	<u>First choice</u>	<u>Top three choices</u>
Total respondents providing choices (100%)	1448 %	1448 %
<u>Provinces and Territories</u>		
Newfoundland/Labrador	2	7
P.E.I.	2	4
Nova Scotia	2	8
New Brunswick	*	1
Quebec	17	51
Ontario	26	55
Manitoba	*	3
Saskatchewan	1	4
Alberta	14	35
British Columbia	29	61
Yukon	5	17
Northwest Territories	1	5
<u>Specific Destinations</u>		
Vancouver	14	35
Niagara Falls	13	27
Montreal	9	27
Rocky Mountains	7	13
Toronto	6	16
Quebec City	6	21
Banff National Park	6	13
Calgary	5	15
Vancouver Island	2	5
Great Lakes	2	6
Ottawa	1	4
Edmonton	1	3
Jasper National Park	1	3
Klondike National Park	1	4

* Less than 0.5%

TABLE 30B

VACATION DESTINATIONS IN THE U.S. - INTEREST IN VISITING

	<u>First choice</u>	<u>Top three choices</u>
Total respondents providing choices (100%)	1463 %	1463 %
<u>Top States</u>		
California	37	71
New York	18	46
Arizona	7	20
Hawaii	5	12
Florida	5	20
Louisiana	4	11
Washington D.C.	3	12
Texas	2	8
Colorado	2	7
Nevada	2	8
Washington	1	3
Massachusetts	1	5
Pennsylvania	1	3
Illinois	*	3
<u>8 Travel Regions</u>		
Travel South	11	36
Visit U.S. West	50	84
New England	3	8
Old West Trail Foundation	3	9
America's Heartland	4	13
Foremost West	12	33
George Washington Country	4	16
Great Lakes	1	5

* Less than 0.5%

TABLE 30B (cont'd)

VACATION DESTINATIONS IN THE U.S. - INTEREST IN VISITING

	<u>First choice</u>	<u>Top three choices</u>
Total respondents providing choices (100%)	1463	1463
	%	%
<u>11 Census Divisions</u>		
West North Central	1	3
East South Central	1	4
New England	3	8
Middle Atlantic	18	48
Middle Atlantic (excluding New York)	1	3
East North Central	1	4
South Atlantic	9	33
South Atlantic (excluding Florida)	4	16
West South Central	6	19
Mountain	7	40
Pacific	40	76
Pacific (excluding California)	3	8
Pacific Islands	5	12
<u>Specific Destinations</u>		
New York City	15	38
Disneyland	11	22
San Francisco	7	18
Los Angeles	7	18
Grand Canyon National Park	6	17
New Orleans	4	10
Niagara Falls	2	5
Yellowstone National Park	2	6
Las Vegas	1	5
San Diego	1	2
Yosemite National Park	1	3
Hollywood	1	3
Boston	1	5
Rockies	1	4
Miami	-	3

* Less than 0.5%

3.6 Summary of awareness, interest and visitation

A summary of awareness, interest and visitation is provided in Tables 31A and 31B. In general, awareness and interest levels followed patterns similar to each other, except that the figures for interest tended to be somewhat lower. This would be partly attributable to the fact that they were based on only three mentions per respondent, while the awareness figures were based on up to five mentions per respondent.

Visitation was a somewhat different story, however. In Canada, British Columbia and Alberta were visited more often than would be predicted from their awareness and interest levels, while Quebec was visited less often. This might reflect some hesitation in visiting a predominantly French speaking destination, but is more likely a result of distance. In the U.S., the destinations that were visited more than "predicted" were also the ones closer to Australia, namely California, Nevada and Hawaii.

(Reference: Tables 31A and 31B)

TABLE 31A

SUMMARY OF AWARENESS, INTEREST
AND VISITATION - CANADA

	5 places people might go on vacation (unaided)	Top 3 places interested in visiting	Visited in past 3 years
Total respondents mentioned a place (100%)	1368 %	1448 %	117 %
<u>Provinces and Territories</u>			
Newfoundland/Labrador	7	7	2
P.E.I.	3	4	3
Nova Scotia	6	8	3
New Brunswick	1	1	1
Quebec	67	51	25
Ontario	72	55	49
Manitoba	7	3	1
Saskatchewan	5	4	4
Alberta	44	35	51
British Columbia	68	61	75
Yukon	9	17	2
Northwest Territories	5	5	-
<u>Specific Destinations</u>			
Vancouver	48	35	63
Montreal	43	27	17
Quebec City	33	21	12
Toronto	31	16	30
Niagara Falls	27	27	27
Calgary	25	15	30
Rocky Mountains	23	13	18
Banff National Park	15	13	33
Great Lakes	14	6	-
Ottawa	11	4	9
Vancouver Island	6	5	17
Winnipeg	5	-	-
Edmonton	5	3	5
Victoria	3	-	9
Jasper National Park	3	3	18
Klondike National Park	1	4	-

TABLE 31B

SUMMARY OF AWARENESS, INTEREST
AND VISITATION - U.S.

	5 places people might go on vacation (unaided)	Top 3 places interested in visiting	Visited in past 3 years
Total respondents mentioned a place (100%)	1485 %	1463 %	250 %
<u>Top States</u>			
California	91	71	85
New York	70	46	41
Arizona	29	20	17
Florida	28	20	14
Washington D.C.	22	12	13
Texas	17	8	10
Nevada	17	8	21
Hawaii	15	12	25
Louisiana	13	11	9
Colorado	7	7	8
Illinois	7	3	8
Massachusetts	7	5	10
Washington	4	3	6
Pennsylvania	3	3	5
<u>8 Travel Regions</u>			
Travel South	44	36	26
Visit U.S. West	96	84	89
New England	12	8	13
Old West Trail Foundation	11	9	7
America's Heartland	16	13	12
Foremost West	42	33	27
George Washington Country	26	16	18
Great Lakes	11	5	13

* Less than 0.5%

TABLE 31B (cont'd)

SUMMARY OF AWARENESS, INTEREST
AND VISITATION - U.S.

	5 places people might go on vacation (<u>unaided</u>)	Top 3 places interested in <u>visiting</u>	Visited in past 3 <u>years</u>
Total respondents mentioned a place (100%)	1485 %	1463 %	250 %
<u>11 Census Divisions</u>			
West North Central	4	3	7
East South Central	4	4	4
New England	12	8	13
Middle Atlantic	71	48	42
Middle Atlantic (excluding New York)	4	3	6
East North Central	10	4	13
South Atlantic	49	33	28
South Atlantic (excluding Florida)	27	16	19
West South Central	30	19	15
Mountain	53	40	36
Pacific	93	76	88
Pacific (excluding California)	8	8	33
Pacific Islands	15	12	-
Atlantic Islands	*	-	1
<u>Specific Destinations</u>			
New York City	61	38	34
Disneyland	40	22	26
Los Angeles	38	18	43
San Francisco	35	18	37
Grand Canyon National Park	26	17	12
Las Vegas	15	5	16
New Orleans	12	10	9
Hollywood	9	3	3
Yellowstone National Park	9	6	4
Niagara Falls	8	5	4
Miami	7	3	2
Rockies	7	4	3
Chicago	6	-	7
Boston	6	5	9
Yosemite National Park	4	3	4
San Diego	4	2	10
Dallas	-	-	3

* Less than 0.5%

3.7 Level of interest in visiting/revisiting U.S./Canada in next 5 years

As an additional measure of vacation potential, respondents were asked how interested they were in visiting or revisiting Canada and the U.S. in the next 5 years. The results were encouraging as 70% were interested in Canada, including 29% who were very interested. Even more respondents (74%) were interested in the U.S., including 39% who were very interested.

INTEREST IN VISITING CANADA OR U.S.

	<u>Canada</u>	<u>U.S.</u>
Total respondents (100%)	1503	1503
	%	%
Very interested	29	39
Somewhat interested	41	35
Not interested	30	26
Mean	<u>2.0</u>	<u>2.1</u>

4. SEGMENTATION OVERVIEW

One of the main objectives of this study was to segment* the target travel market on an attitudinal, motivational and product wants/needs basis. This was necessary to achieve a better understanding of international travelers so that sound information, beyond demographics and behavioral characteristics, could be gathered for marketing purposes.

A total of three separate segmentation analyses were performed for this study, each relating to a different series of ratings items as follow:

Travel philosophy
segmentation

- Based on a series of 25 agree-disagree statements relating to how people think about travel in an overall sense as well as how they prefer to travel. The statements took in a variety of issues ranging from making travel arrangements to preferences for different kinds of trips.

Benefit
segmentation

- Based on the importance ratings of a series of 30 items relating to reasons people might want to go on vacation and to experiences they might be looking for.

Product
segmentation

- Based on the importance ratings of 52 different activities, features, and amenities that are important in the selection of a vacation destination.

The main benefit of any segmentation analysis is that different segments with varying characteristics are identified, so that from a marketing standpoint it becomes possible to appeal to the actual needs and wants associated with each segment. In other words, since each segment has a different value structure a different marketing strategy is appropriate and can be developed for each one.

* The segmentation was accomplished using a K-means cluster analysis which is a multivariate statistical analysis technique that divides the market into groups or clusters of respondents sharing similar profiles. The clusters are developed so that respondents within a given segment are as similar as possible to each other, while respondents in different segments are as different as possible from each other.

Segmentation, or cluster, analysis is typically performed on respondent ratings on a series of statement or attribute items presented to them. Accordingly, each respondent has a profile as revealed by their response to the various ratings items. Since it is a multivariate technique, cluster analysis simultaneously considers each respondent's ratings of each item (i.e. each respondent's overall pattern of response) in assigning that respondent to a particular cluster group or segment.

Furthermore, it is usual for the segments to range from high to low marketing potential, so that the main effort can be directed towards the high potential segments as a means of increasing the overall efficiency of marketing activity.

The key advantages of performing three separate segmentations as done in this study are:

1. It provides three different views of the thought processes of international travelers.
2. It becomes possible to cross-profile one set of segment solutions with each of the other two sets.

With respect to this latter point, a standard procedure in any segmentation analysis is to profile the resulting segments in terms of key demographic and behavioural data as a means of better understanding each particular group. Cross-profiling against the other sets of segment solutions gives further insight regarding the make-up of each group and enables better strategic planning for marketing development and policy purposes.

For the purposes of this report, the product segments form the marketing framework on which the analysis is based. Since these segments describe what products travelers from different countries want, they are therefore the most useful in indicating which products Canada and the U.S. should develop and market to appeal to their tastes. The other two segment approaches, travel philosophy and benefit, are also useful in their own right, and in this report they are used to profile the travelers in each of the product segments. In other words, in the same way that variables such as sex and age can be used to describe the product segments demographically, so too can travel philosophy and benefit segments be used to describe the product segments attitudinally.

This information is presented first by describing the travel philosophy and benefit segments, followed by the product segments, followed by a profile of the latter against the first two. It should be emphasized that this approach is only one of several that are possible. For example, some readers might begin with the benefit segments to form a marketing framework, and then use the travel philosophy and product segment as the profiling variables. This type of approach would be equally valid as the one used in this report, and potentially more useful for some other applications.

It is important to point out that the segmentation analyses performed are obviously based on the respondents in the sample i.e. the target long haul travel market. As this target market represents about 35% of the total adult population, it is a somewhat narrowly defined segment in itself. The analyses performed here are an attempt to further segment that particular market, and the results should certainly not be extrapolated to the population of Australia as a whole.

In the following sections of this report, an understanding of what each segment depicts is provided by presenting the statements for each segment with the highest and lowest deviations from the overall mean (for that particular statement). For example, if a segment had a mean rating of 3.5 on a specific statement and the total sample had a mean rating of 3.0, then the deviation from the overall mean for that statement would be +0.5.

These deviations show what tends to be important to a specific segment. Furthermore, deviations may show that a specific segment includes more than one type of interest. It should be noted that a high positive deviation does not necessarily mean that an attribute is important in an absolute sense, but rather that it distinguishes a particular segment in a relative sense. Similarly, an attribute of uniformly high importance to all groups would not appear as a differentiating variable in terms of deviations from the mean. The deviations therefore serve only to differentiate the segments on a relative basis.

5. TRAVEL PHILOSOPHY SEGMENTATION

As noted in the previous section, the approach taken in this report is to treat the product segmentation as the primary segmentation solution, and to use the philosophy and benefit segments as profiling variables. In order to lay the framework for this analysis, the philosophy and benefit segmentations will be discussed first.

5.1 Overview

The philosophy segmentation was based on a series of 25 statements relating to how people think about travel in an overall sense as well as how they prefer to travel. The statements took in a variety of issues ranging from making travel arrangements to preferences for different kinds of trips. Respondents were asked on a 4-point scale how much they agreed or disagreed with each statement in order to obtain an overall profile of their travel attitudes or philosophy.

Before looking at the segmentation results themselves, it is worthwhile examining the general tendencies of Australian long haul pleasure travelers based on their overall mean scores on the four point scale used.

Respondents seemed strongly disposed towards travel in that they thought money spent on travel was well spent (mean score of 3.6). They were not extravagant, however, as they believed that value for vacation money (3.6), and inexpensive travel to the destination (3.2) were important considerations. They did not have to spend a lot of money to enjoy a vacation (3.1), and often traveled on reduced fares (2.9).

New and different destinations tended to be of relatively high interest as respondents preferred to travel from place to place (3.4) rather than to stay put (2.0). They also liked to go to different places on each trip (3.1), rather than to places they had been to before (2.2).

In keeping with this overall positive orientation towards travel, respondents also tended to enjoy making their own travel arrangements (3.1), preferably before leaving (3.3), and disagreed that making arrangements were such a bother they would rather not travel (1.6).

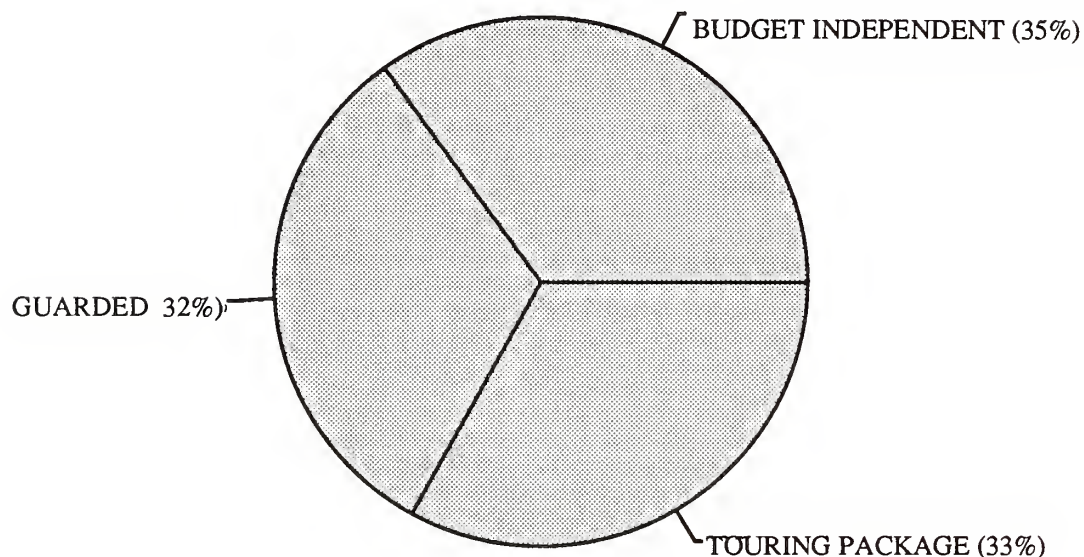
(Reference: Table 32)

5.2 Segments

The segmentation analysis yielded a total of three travel philosophy segments.

FIGURE 5

TRAVEL PHILOSOPHY SEGMENTS



Based on total sample of 1,503 respondents

As noted earlier, these are best understood by examining the statements for each segment having the highest and lowest deviations from the overall mean for a statement. It should be remembered that these deviations provide a relative rather than an absolute comparison of the various segments.

The following are brief descriptions of the travel philosophy segments relative to each other:

Budget
Independent
traveler
(35%)

- The travelers in this group differ from the other two groups in that they enjoy making their own travel arrangements, preferably as they go along. They tend to stay away from package vacations and guided tours, preferring not to rely on travel agents and co-travelers for their arrangements. At the same time, these travelers have a preference for travel at a reduced cost. They do not feel it is worth paying for luxuries. Inexpensive travel to their destination and reduced air fares are therefore important considerations to this group.

Touring
Package
traveler
(33%)

- This group shows a preference for traveling on packages and guided tours. They are also interested in seeing different places on each trip, as well as in traveling from place to place rather than staying put. Package travel presumably provides a convenient way of satisfying these needs. They also prefer having someone else (either a co-traveler or travel agent) make their arrangements for them, as well as having their arrangements made before they travel.

Guarded
traveler
(32%)

- This segment has a somewhat guarded approach to travel. They would just as soon spend their money on things other than travel. When they do travel they like to stay put in their destination rather than travel from place to place. They tend to choose destinations to which they have already been, and where people speak a familiar language. They are generally not interested in making their own travel arrangements. Their interest in package travel therefore seems to be its promise of a simple, low-risk vacation.

(Reference: Table 33)

In order to provide a visual representation of the differences among travel philosophy segments, a discriminant map of the results was produced. For a description of how to interpret a discriminant map see Appendix V.

The two dimensions shown in the discriminant map accounted for 94% of the variance in the differences among the segment groups. For the sake of clarity only the most important attributes (i.e. the ones with the most discriminating ability) are shown on the map.

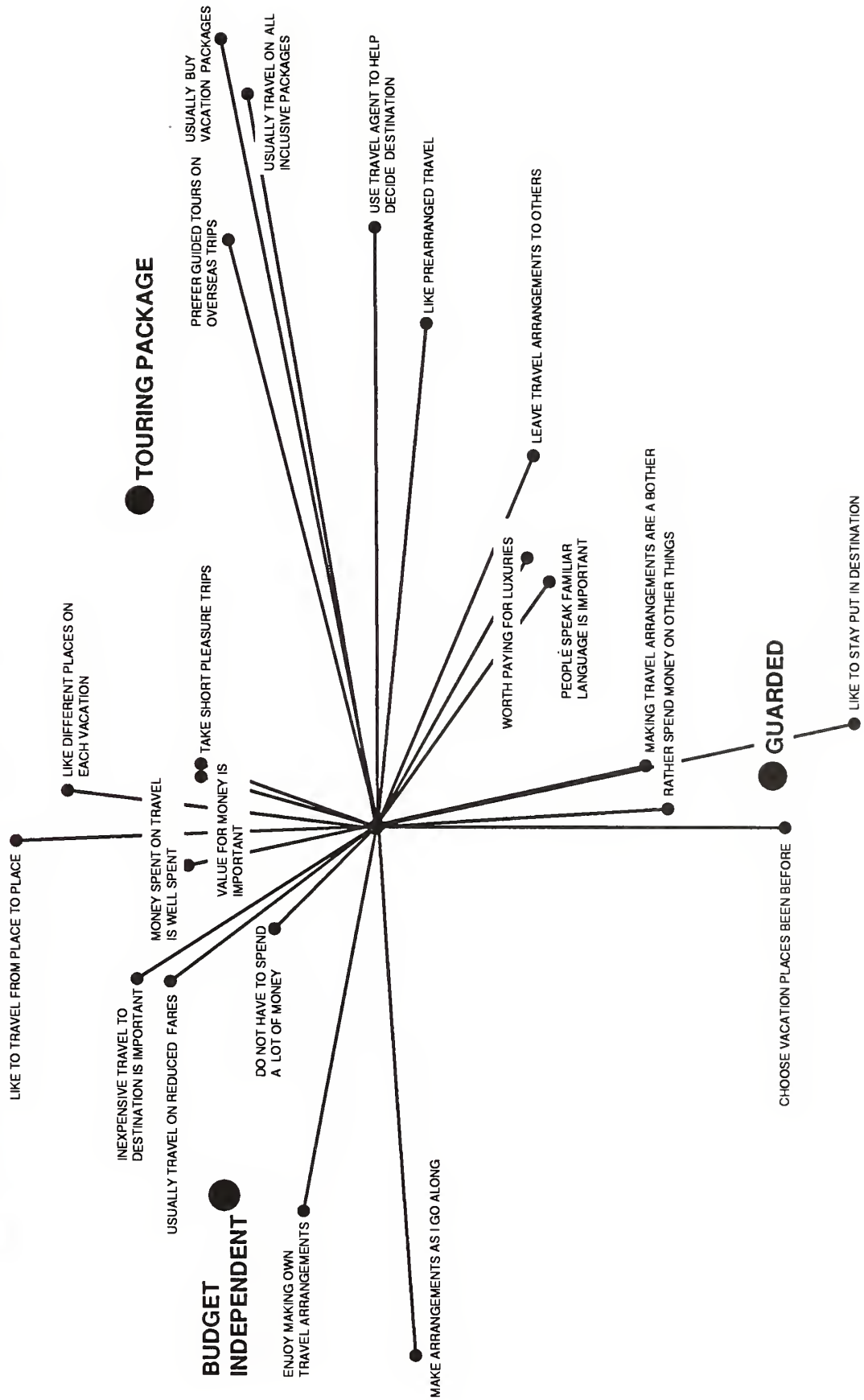
To the left of the map is the Budget Independent group associated with such attributes as "enjoy making own travel arrangements", "make arrangements as I go along", "usually travel on reduced fares", and "inexpensive travel to destination is important"..

The Touring Package group is situated in the top right of the map in between such attributes as "like different places on each vacation", "like to travel from place to place" and "prefer guided tours on overseas trips", "usually buy vacation packages".

The Guarded group is near the bottom of the map associated with such attributes as "choose vacation places been before", "like to stay put in destination", "rather spend money on other things", and "making travel arrangements are a bother".

(Reference: Figure 6)

FIGURE 6
DISCRIMINANT MAP FOR TRAVEL PHILOSOPHY SEGMENTS



5.3 Segment profiles

With respect to the profiles of the different travel philosophy segments, the following are characteristics which disproportionately describe each segment:

Budget

Independent

traveler

- More likely than average to be:
 - young (25-34 years of age)
 - single
 - in a professional/technical occupation
 - university educated
- More likely than average to have:
 - taken more vacation trips in the past 3 years
 - spent more nights away on their trip
 - traveled in winter (Australian summer)
 - used books/library in planning their trip
 - taken an independent type of trip
 - booked their trip directly with the hotel
 - traveled by rented car within the U.S.
 - traveled by public transportation within Canada
- More likely than average to read the Sydney Morning Herald and Weekend Australian

Touring

Package

traveler

- More likely than average to be:
 - older (55 years or more)
- More likely than average to have:
 - visited Asia in the past 3 years
 - spent fewer nights away on their trip
 - traveled in fall (Australian spring)
 - taken a touring or resort trip
 - had a travel partner (i.e. not traveled alone)
 - traveled with a larger travel party
 - used brochures/pamphlets in planning their trip
 - taken an all-inclusive guided tour
 - booked their trip through a travel agent
 - booked their trip further in advance
 - traveled by bus or boat within Canada
- More likely than average to be interested in:
 - visiting Canada
- More likely than average to read New Idea, TV Week, and Woman's Day

Guarded
traveler

- More likely than average to have:
 - taken a trip to visit friends and relatives
 - decided on their destination closer to departure
 - traveled by plane within the U.S. and Canada

There were basically no differences between the segments in terms of the specific destinations within Canada and the U.S. which they were most interested in visiting.

(Reference: Tables 34 to 38)

5.4 Implications

All three philosophy segments were basically equal in terms of their existing levels of travel to Canada and the U.S., as well as in their future interest in traveling to those destinations. All three groups should therefore be treated as opportunities for promoting travel.

Budget Independent travelers enjoy making their own travel arrangements and tend to avoid package travel. At the same time they are budget conscious and looking for inexpensive travel. It should therefore not be surprising that they tend to be young and single. As will be seen later in this report, however, Canada and the U.S. are not generally perceived as being inexpensive travel destinations (see Section 8). Some improvement in this image would therefore seem to be called for, and perhaps could be tied in with the recent strength of the Australian dollar.

While the Touring Package group is disposed towards travel on package tours, existing levels of package travel to Canada and the U.S. are relatively low when compared with other destinations (see Table 14). Regardless of whether this is because existing packages are unavailable, inappropriate, or under-promoted, the need for improved product offerings in this area is clear. Touring Package travelers would logically be more of a target for North America than for Hawaii/Guam/Samoa, and in fact already has an above average interest in visiting Canada. Any packages developed to meet the needs of this segment, however, should take into account the older profile of this group.

The Guarded traveler (who is more interested in staying put than traveling from place to place) would logically be more of a target for Hawaii/Guam/Samoa and destinations on the west coast of North America. The fact that English is spoken in these destinations would be an advantage in marketing to this group.

TABLE 32

AGREEMENT WITH TRAVEL PHILOSOPHY

STATEMENTS - MEAN SCORES

(Maximum possible = 4.0, minimum possible = 1.0)

	<u>Total</u>
Total respondents	1503
Money on travel is well spent	3.6
Value for vacation money is important	3.6
Rather travel from place to place than stay put	3.4
Like to have arrangements made before leaving	3.3
Inexpensive travel to destination is important	3.2
Take short pleasure trips whenever can	3.1
Enjoy making own arrangements	3.1
Like to go to different places each trip	3.1
Don't have to spend a lot to enjoy vacation	3.1
Usually travel on reduced fares	2.9
Often choose places friends have been	2.8
Like to make arrangements as go along	2.7
Don't have to travel to enjoy vacation	2.7
Worth paying for luxuries	2.6
Usually buy vacation packages	2.5
Usually use travel agent to help choose destination	2.4
Important that people speak my language	2.4
Prefer a number of short trips over one long trip	2.3
Prefer guided tours	2.3
Usually travel on all-inclusive packages	2.2
Usually choose places been before	2.2
Just as soon spend on things other than travel	2.1
Like to stay put at destination	2.0
Prefer to leave organizing to co-traveler	2.0
Arrangements such a bother rather not travel	1.6

TABLE 33

TRAVEL PHILOSOPHY SEGMENTS

	Deviation from overall <u>statement mean</u>
<u>BUDGET INDEPENDENT (35%)</u>	
Like to make arrangements as go along	+0.6
Enjoy making own travel arrangements	+0.5
Usually travel on reduced fares	+0.3
Inexpensive travel to destination is important	+0.3
Like to stay put at destination	-0.3
People speak familiar language is important	-0.4
Worth paying for luxuries	-0.4
Prefer to leave travel arrangements to co-traveler	-0.5
Prefer to go on guided tours	-0.6
Like to have arrangements made before leaving	-0.6
Usually use travel agent to help choose destination	-0.7
Usually travel on all-inclusive packages	-0.7
Usually buy vacation packages	-0.8
<u>TOURING PACKAGE (33%)</u>	
Usually buy vacation packages	+0.9
Usually travel on all-inclusive packages	+0.8
Prefer to go on guided tours	+0.7
Usually use a travel agent to help choose destination	+0.6
Like to have arrangements made before leaving	+0.5
Prefer to leave the organizing to co-traveler	+0.3
Like different places on each trip	+0.3
Like to travel from place to place rather than stay put	+0.3
Like to stay put in destination	-0.2
Usually choose vacations been before	-0.3
Enjoy making own travel arrangements	-0.3
Like to make arrangements as I go along	-0.6
<u>GUARDED (32%)</u>	
Like to stay put in destination	+0.6
Usually choose vacation places been before	+0.5
Just as soon spend on things other than travel	+0.4
People speak familiar language is important	+0.3
Arrangements such a bother rather not travel	+0.3
Prefer to leave travel arrangements to co-traveler	+0.3
Money spent on travel is well spent	-0.2
Usually travel on reduced fares	-0.3
Like different places on each trip	-0.4
Like to travel from place to place rather than stay put	-0.5

TABLE 34

TRAVEL PHILOSOPHY SEGMENTS
DEMOGRAPHICS

	Total	TRAVEL PHILOSOPHY SEGMENT		
		Budget Independent traveler	Touring Package traveler	Guarded traveler
Total respondents (100%)	1503 %	515 %	495 %	482 %
<u>Sex</u>				
Male	49	50	44	52
Female	51	50	56	48
<u>Age</u>				
18 - 24 years	13	14	11	13
25 - 34 years	23	30	19	21
35 - 44 years	22	22	21	23
45 - 54 years	17	15	17	17
55 - 64 years	15	12	19	13
65 years or over	11	8	12	13
<u>Marital status</u>				
Single	22	28	17	21
Married	66	60	71	68
Living together	2	3	1	2
Divorced/separated/widowed	10	9	11	9
<u>Occupation</u>				
Owner	4	4	5	4
Manager/executive	7	8	7	8
Professional/technical	20	26	14	20
Clerical/sales	17	16	21	15
Skilled worker	12	12	11	14
Unskilled worker	5	5	4	5
Student	5	6	4	3
Retired	13	10	15	12
Homemaker	16	12	18	18
<u>City</u>				
Sydney	40	44	39	36
Melbourne	30	27	28	33
Brisbane	10	9	13	10
Adelaide	9	10	9	9
Perth	11	10	11	12

Note: Circled numbers represent those referred to in the main text

TABLE 34 (cont'd)

TRAVEL PHILOSOPHY SEGMENTS
DEMOGRAPHICS

		<u>TRAVEL PHILOSOPHY SEGMENT</u>		
	<u>Total</u>	<u>Budget Independent traveler</u>	<u>Touring Package traveler</u>	<u>Guarded traveler</u>
Total respondents (100%)	1503	515	495	482
	%	%	%	%
<u>Education</u>				
Primary	5	3	3	8
Secondary/high school	46	38	53	47
Technical/commercial	27	27	26	27
University/post graduate	23	32	18	19
<u>Life cycle</u>				
Living alone	10	12	9	9
Living with one adult	30	29	30	30
Single with children	7	6	6	7
Couple with children	33	32	34	31
Other	21	20	21	22
<u>Living arrangement</u>				
Live alone	10	12	9	9
Live with children	41	40	41	40
Live without children	49	48	50	51
<u>Mean no. of adults 18 years or over</u>	<u>2.4</u>	<u>2.4</u>	<u>2.4</u>	<u>2.4</u>
<u>Whether any children under 18 years in household</u>				
Yes	41	40	41	40
No	59	60	59	60
<u>Household income in Australian dollars (1987/88 financial year)</u>				
Under \$20,000	16	12	18	18
\$20,000 - 29,999	16	17	14	16
\$30,000 - 39,999	16	17	17	14
\$40,000 - 49,999	13	14	13	13
\$50,000+	24	27	22	22
Refused	16	13	17	18

Note: Circled numbers represent those referred to in the main text

TABLE 35

TRAVEL PHILOSOPHY SEGMENTS

TRAVEL CHARACTERISTICS

		<u>TRAVEL PHILOSOPHY SEGMENT</u>		
		<u>Budget</u> <u>Independent</u> <u>traveler</u>	<u>Touring</u> <u>Package</u> <u>traveler</u>	<u>Guarded</u> <u>traveler</u>
Total respondents (100%)	<u>Total</u> 1503 %	515 %	495 %	482 %
<u>Mean no. of 4+ night pleasure</u> <u>trips in past 3 years</u>	<u>3.7</u>	<u>4.0</u>	<u>3.5</u>	<u>3.6</u>
<u>Destinations visited</u> <u>in past 3 years*</u>				
Australia	36	39	36	34
Outside Australia	93	94	94	92
<u>Destinations visited on two</u> <u>most recent long haul trips**</u>				
Europe/United Kingdom	37	43	28	38
Asia	36	33	<u>43</u>	32
Mainland U.S. (including Alaska)	16	19	14	16
New Zealand	13	13	14	11
Other South Pacific	10	8	9	12
Hawaii/Guam/Samoa	8	7	10	8
Canada	7	8	6	7
Near/Middle East	5	6	3	5
Africa	2	4	1	1
Mexico	2	3	1	2
West Indies/Caribbean	1	1	1	1
Central/South America	1	1	-	1

* Based on 1,240 respondents who had actually taken at least one such trip

** Based on 1,548 such trips taken by respondents

Note: Circled numbers represent those referred to in the main text

TABLE 35 (cont'd)

TRAVEL PHILOSOPHY SEGMENTS

TRAVEL CHARACTERISTICS

		<u>TRAVEL PHILOSOPHY SEGMENT</u>		
		<u>Budget</u> <u>Independent</u> <u>traveler</u>	<u>Touring</u> <u>Package</u> <u>traveler</u>	<u>Guarded</u> <u>traveler</u>
Total respondents (100%)	<u>Total</u> 1503 %	515 %	495 %	482 %
<u>One long haul destination</u> <u>most like to visit</u>				
Europe/United Kingdom	41	41	38	34
Asia/South Pacific	22	24	22	19
Mainland U.S. (including Alaska)	14	12	13	15
Canada	7	4	10	7
New Zealand	5	4	7	5
Africa	4	4	4	4
Central/South America	3	6	1	2
Near/Middle East	2	2	1	2
Hawaii/Guam/Samoa	2	1	3	2
West Indies/Caribbean	*	1	1	-
Mexico	*	1	-	*

Note: Circled numbers represent those referred to in the main text

* Less than 0.5%

TABLE 35 (cont'd)

TRAVEL PHILOSOPHY SEGMENTS

TRAVEL CHARACTERISTICS

		TRAVEL PHILOSOPHY SEGMENT		
		Budget Independent traveler	Touring Package traveler	Guarded traveler
Total respondents took long haul trip (100%)	<u>1158</u> %	409 %	402 %	341 %
<u>Mean no. of nights away on trip</u>	<u>51.7</u>	(71.2)	(31.8)	<u>52.0</u>
<u>Season trip was taken</u>				
December to February	21	(27)	17	19
March to May	24	22	25	26
June to August	31	29	29	35
September to November	24	22	(29)	20
<u>Type of trip (Two most recent)</u>				
Visit friends and relatives	37	41	23	(48)
Touring trip	35	33	(45)	24
Resort	11	9	(17)	8
Combined business and pleasure	11	11	10	13
City	4	4	4	4
Outdoor trip	1	2	*	1
Exhibition, special event or theme park	1	*	1	1
Cruise	1	*	1	1
<u>People traveled with</u>				
Wife/husband/girl friend/boy friend	55	52	61	53
Traveled alone	20	26	(11)	24
Child(ren)	19	20	18	19
Friends	13	12	16	9
Other relatives	6	5	7	7
Father/mother	5	4	5	5
Organized group/club/etc.	4	2	8	2
Business associates/colleagues	2	2	3	2
<u>Mean no. of people in travel party</u>	<u>2.8</u>	<u>2.6</u>	(3.3)	<u>2.5</u>
<u>Mean no. of children under 18 in travel party</u>	<u>0.7</u>	<u>0.8</u>	<u>0.7</u>	<u>0.7</u>

Note: Circled numbers represent those referred to in the main text

TABLE 35 (cont'd)

TRAVEL PHILOSOPHY SEGMENTS				
TRAVEL CHARACTERISTICS				
	Total	TRAVEL PHILOSOPHY SEGMENT		
		Budget Independent traveler	Touring Package traveler	Guarded traveler
Total respondents took long haul trip (100%)	1158 %	409 %	402 %	341 %
<u>Sources of information used in planning</u>				
Travel agent	69	62	73	74
Friends/family	44	46	44	43
Brochures/pamphlets	41	38	(50)	34
Newspaper/magazine article	17	20	18	12
Airline	15	19	11	17
Books/library	9	(15)	7	5
Advertisements	8	7	9	7
Tour operator/company	5	3	6	5
Government tourism office/board	5	5	5	6
Clubs/associations	4	4	5	2
Embassy/consulate	4	5	4	3
Personal/previous experience	4	6	2	4
Automobile Association	2	3	3	*
Someone else made reservations	2	2	2	2
None	5	7	5	5
<u>Trip type</u>				
Independent	51	(71)	25	59
Flight and accommodation package only	30	20	39	31
All-inclusive guided tour	14	4	(29)	7
Guided tour only	5	5	7	4
<u>Where booked</u>				
Travel agent	86	81	(90)	85
Airline	14	18	10	15
Direct with hotel etc.	10	(18)	3	7
Tour company/holiday company	2	2	3	1

Note: Circled numbers represent those referred to in the main text

* Less than 0.5%

TABLE 35 (cont'd)

TRAVEL PHILOSOPHY SEGMENTS
TRAVEL CHARACTERISTICS

	<u>Total</u>	<u>TRAVEL PHILOSOPHY SEGMENT</u>		
		<u>Budget Independent traveler</u>	<u>Touring Package traveler</u>	<u>Guarded traveler</u>
Total respondents took long haul trip (100%)	1158 %	409 %	402 %	341 %
<u>Number of months before leaving - decided on destination</u>				
2 months or less	33	33	25	(40)
Over 2 months - 4 months	17	16	17	18
Over 4 months - 6 months	23	23	27	19
Over 6 months - 8 months	4	4	6	3
Over 8 months	23	24	25	20
<u>Number of months before leaving - trip was booked</u>				
1 month or less	29	35	20	32
Over 1 month - 2 months	22	19	22	26
Over 2 months - 3 months	16	16	17	13
Over 3 months - 4 months	9	8	10	10
Over 4 months	24	22	(31)	18
Total trips to U.S. taken by respondents (100%)	250 %	105 %	76 %	69 %
<u>Mode of transportation used within the U.S.</u>				
Plane	78	75	72	(87)
Rented car	41	(48)	38	33
Bus (between cities)	36	40	39	26
Public transportation (within cities)	33	39	31	28
Private car	29	27	29	30
Train	19	20	13	23
Boat	7	11	6	3
Camper or RV	2	3	1	1
Total trips to Canada taken by respondents (100%)	108 %	44 %	34+ %	30+ %
<u>Mode of transportation used within Canada</u>				
Plane	48	37	47	(66)
Private car	37	42	16	52
Public transportation (within cities)	26	(40)	13	21
Bus (between cities)	26	21	(47)	10
Train	25	28	25	21
Rented car	24	21	25	28
Boat	12	7	(28)	-
Camper or RV	4	5	3	3

+ Note: small base

Note: Circled numbers represent those referred to in the main text

TABLE 36

TRAVEL PHILOSOPHY SEGMENTS
TOP THREE VACATION DESTINATIONS
INTERESTED IN VISITING - CANADA

	<u>Total</u>	<u>TRAVEL PHILOSOPHY SEGMENT</u>		
		<u>Budget Independent traveler</u>	<u>Touring Package traveler</u>	<u>Guarded traveler</u>
Total respondents (100%)	1503 %	515 %	495 %	484 %
<u>Provinces and Territories</u>				
Newfoundland/Labrador	7	10	5	5
P.E.I.	4	5	5	2
Nova Scotia	8	10	6	7
New Brunswick	1	1	2	1
Quebec	51	47	51	55
Ontario	55	53	56	55
Manitoba	3	3	3	4
Saskatchewan	4	3	5	4
Alberta	35	32	34	38
British Columbia	61	65	58	61
Yukon	17	18	18	15
Northwest Territories	5	6	3	4
<u>Specific Destinations</u>				
Vancouver	35	33	34	39
Montreal	27	23	27	31
Niagara Falls	27	25	28	28
Quebec City	21	19	22	24
Toronto	16	16	14	19
Calgary	15	13	14	18
Banff National Park	13	14	15	10
Rocky Mountains	13	12	16	12
Great Lakes	6	7	6	6
Vancouver Island	5	7	4	5
Klondike National Park	4	4	5	4
Ottawa	4	4	4	5

Note: Circled numbers represent those referred to in the main text

TABLE 37

TRAVEL PHILOSOPHY SEGMENTS
TOP THREE VACATION DESTINATIONS
INTERESTED IN VISITING - U.S.A.

	<u>Total</u>	<u>TRAVEL PHILOSOPHY SEGMENT</u>		
		<u>Budget Independent traveler</u>	<u>Touring Package traveler</u>	<u>Guarded traveler</u>
Total respondents (100%)	1503 %	515 %	495 %	484 %
<u>Top States</u>				
California	71	65	75	73
New York	46	49	41	48
Florida	20	18	23	18
Arizona	20	22	21	17
Hawaii	12	9	13	13
Washington D.C.	12	9	15	12
Louisiana	11	13	11	8
Texas	8	7	8	9
Nevada	8	7	10	6
Colorado	7	8	5	7
Massachusetts	5	6	4	5
Washington	3	2	2	5
Illinois	3	2	3	3
Pennsylvania	3	2	2	3
<u>8 Travel Regions</u>				
Travel South	36	33	39	34
Visit U.S. West	84	81	86	84
New England	8	11	5	8
Old West Trail Foundation	9	11	10	6
America's Heartland	13	15	13	10
Foremost West	33	36	33	30
George Washington Country	16	12	18	18
Great Lakes	5	5	4	6

Note: Circled numbers represent those referred to in the main text

TABLE 37 (cont'd)

TRAVEL PHILOSOPHY SEGMENTS
TOP THREE VACATION DESTINATIONS
INTERESTED IN VISITING - U.S.A.

	<u>Total</u>	<u>TRAVEL PHILOSOPHY SEGMENT</u>		
		<u>Budget</u> <u>Independent</u> <u>traveler</u>	<u>Touring</u> <u>Package</u> <u>traveler</u>	<u>Guarded</u> <u>traveler</u>
Total respondents (100%)	1503 %	515 %	495 %	484 %
<u>11 Census Divisions</u>				
West North Central	3	3	3	2
East South Central	4	3	3	6
New England	8	11	5	8
Middle Atlantic	48	50	42	51
Middle Atlantic (excluding N.Y.)	3	3	2	4
East North Central	4	4	4	6
South Atlantic	33	28	39	31
South Atlantic (excluding Florida)	16	12	19	18
West South Central	19	21	18	18
Mountain	40	43	40	35
Pacific	76	72	78	78
Pacific (excluding California)	8	11	7	8
Pacific Islands	12	9	13	13
Atlantic Islands	*	1	-	-
<u>Specific Destinations</u>				
New York City	38	42	33	40
Disneyland	22	20	26	21
San Francisco	18	17	20	18
Los Angeles	18	18	19	17
Grand Canyon National Park	17	19	17	14
New Orleans	10	12	10	7
Yellowstone National Park	6	7	8	4
Boston	5	5	4	5
Las Vegas	5	5	7	4
Niagara Falls	5	4	6	4
Rockies	4	6	4	3
Yosemite National Park	3	4	5	2
Hollywood	3	2	3	5

Note: Circled numbers represent those referred to in the main text

TABLE 38

TRAVEL PHILOSOPHY SEGMENTS
MEDIA READERSHIP

	<u>Total</u>	<u>TRAVEL PHILOSOPHY SEGMENT</u>		
		<u>Budget Independent traveler</u>	<u>Touring Package traveler</u>	<u>Guarded traveler</u>
Total respondents (100%)	1503 %	515 %	495 %	484 %
<u>Top 5 daily newspapers</u>				
Sydney Morning Herald	21	27	18	19
The Age	16	18	13	17
The Sun	15	10	18	18
Daily Telegraph	13	12	13	14
The Herald	9	8	11	10
Western Australian	9	8	10	10
<u>Top 5 Sunday papers</u>				
Sun-Herald	22	23	24	20
Sunday Telegraph	18	18	19	17
Sunday Mail	12	11	14	13
Weekend Australian	9	15	6	7
Sunday Times	9	7	10	11
<u>Top 5 weekly magazines</u>				
New Idea	26	20	34	26
TV Week	22	18	27	22
Woman's Day	18	13	24	18
Bulletin/Newsweek	12	14	11	10
Time	10	13	8	8
<u>Top 5 monthly magazines</u>				
Australian Women's Weekly	26	21	31	26
Reader's Digest	15	15	18	14
House and Garden	12	11	11	12
Better Homes and Gardens	11	9	13	13
Family Circle	9	8	12	9

Note: Circled numbers represent those referred to in the main text

6. BENEFIT SEGMENTATION

6.1 Overview

This segmentation was based on the importance ratings given to a series of 30 items relating to reasons why people might want to go on a vacation, and to experiences sought.

In terms of the overall most important benefits, respondents gave high ratings to attributes related to expanding their horizons. These attributes included seeing as much as possible in the time available (3.5), seeing and experiencing a foreign destination (3.5), learning new things, increasing knowledge (3.4), experiencing new and different lifestyles (3.4), trying new foods (3.2), and traveling through places important in history (3.1).

The outgoing Australian national character was reflected in the importance of being free to act the way I feel (3.3), having fun/being entertained (3.3), and meeting people with similar interests (3.0).

The concept of having a good time, however, was generally not related to doing nothing at all (1.9), nor to more active pursuits such as participating in sports (1.9), roughing it (2.0), or even just watching sporting events (2.0).

Another important benefit for travelers was simply getting away from their daily routine. For example, escaping from the ordinary (3.1), getting a change from a busy job (3.0), and getting away from the demands of home (2.9) were highly rated benefits.

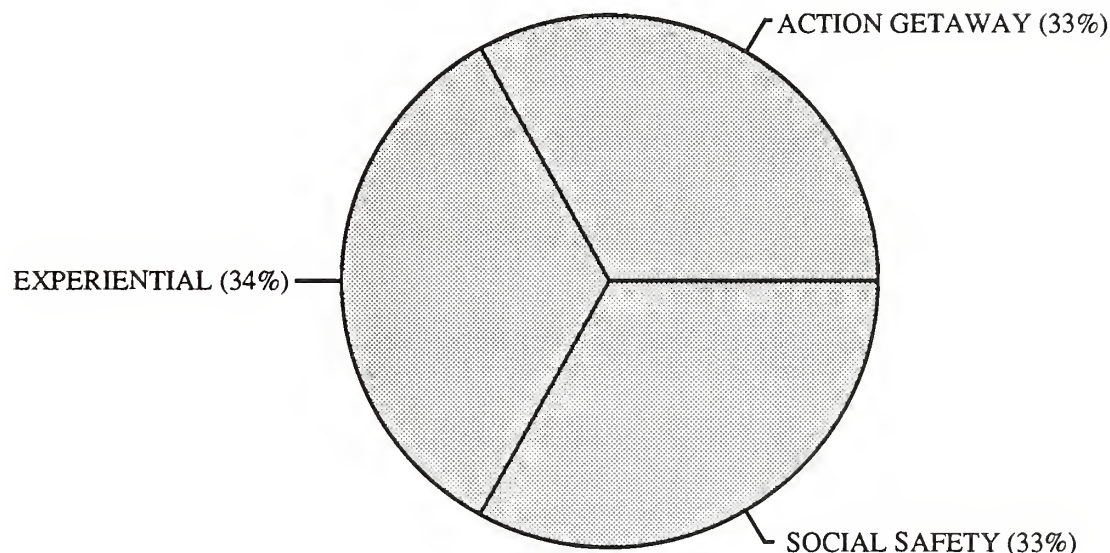
(Reference: Table 39)

6.2 Segments

A total of three benefit segments were identified in the analysis.

FIGURE 7

BENEFIT SEGMENTS



Based on total sample of 1,503 respondents

The following descriptions indicate the ways in which each group is different from the average:

Action Getaway traveler (33%)

- This group of respondents is looking for challenging physical activities. They enjoy participating in sports and being physically active. They are not afraid to rough it. Being daring and adventuresome, and finding thrills and excitement are also strong motivational factors. Family related activities do not fit into their travel plans. Part of their overall interest in action and adventure results from a desire to get a change from a busy job.

Social Safety
traveler
(33%)

- Travelers in this group have a strong social orientation in terms of the benefits they seek. They like to visit friends, relatives and places their family came from, and they enjoy being together as a family. They also enjoy meeting people with similar interests from outside their family. At the same time they have a conservative outlook on travel. They prefer to travel to places where they feel safe and secure, and are generally not interested in adventure and new experiences.

Experiential
travelers
(34%)

- These travelers are mainly interested in the experiences that are offered by the opportunity to travel. These include trying new foods, and new and different lifestyles. Simply seeing and experiencing a foreign destination is of interest to this group, as is traveling through places important in history. In other words, just being in a different country is a reward in itself.

(Reference: Table 40)

6.3 Segment profiles

The following characteristics disproportionately describe each segment:

Action Getaway traveler

- More likely than average to be:
 - male
 - younger (18-34 years)
 - single (40%)
- More likely than average to have:
 - been interested in visiting the mainland U.S.
 - traveled in winter (i.e. Australian summer)
 - taken a resort type trip
 - traveled alone or with friends who were not girl/boy friends
 - traveled less by bus within Canada

Social Safety traveler

- More likely than average to be:
 - older (55 years or over)
 - married
 - retired or a homemaker
 - lower income
- More likely than average to have:
 - actually visited Europe in the past three years
 - been most interested in visiting Europe
 - traveled in summer (i.e. Australian winter)
 - taken a trip to visit friends or relatives
 - traveled less by public transportation and trains within Canada

Experiential traveler

- More likely than average to be:
 - female
 - university educated
- More likely than average to have:
 - visited Asia in the past three years
 - taken a touring trip
 - traveled with a wife/husband/girl friend/boy friend
 - used brochures/pamphlets, newspaper/magazine articles, and books/library as sources of planning information
 - traveled on an all-inclusive guided tour or a flight/accommodation package
 - booked their trip longer in advance
 - traveled by public transportation and boat within the U.S.
 - traveled by boat within Canada

(Reference: Tables 41 to 45)

Again in order to provide a visual summary of the differences among the segments a discriminant map was produced. The two dimensions shown on the map accounted for all (100%) of the variance in the differences among the segment groups. It should again be noted that only the most important attributes (the ones with the most discriminating ability) are shown on the map.

The wide spacing of the three segment groups on the map indicates that they are quite distinct from each other. The Social Safety group is located in the left part of the map strongly associated with attributes relating to friends and family. There is also a strong association with the "safety and security" attribute, and a strong dissociation with the adventure and excitement attributes on the right side of the map.

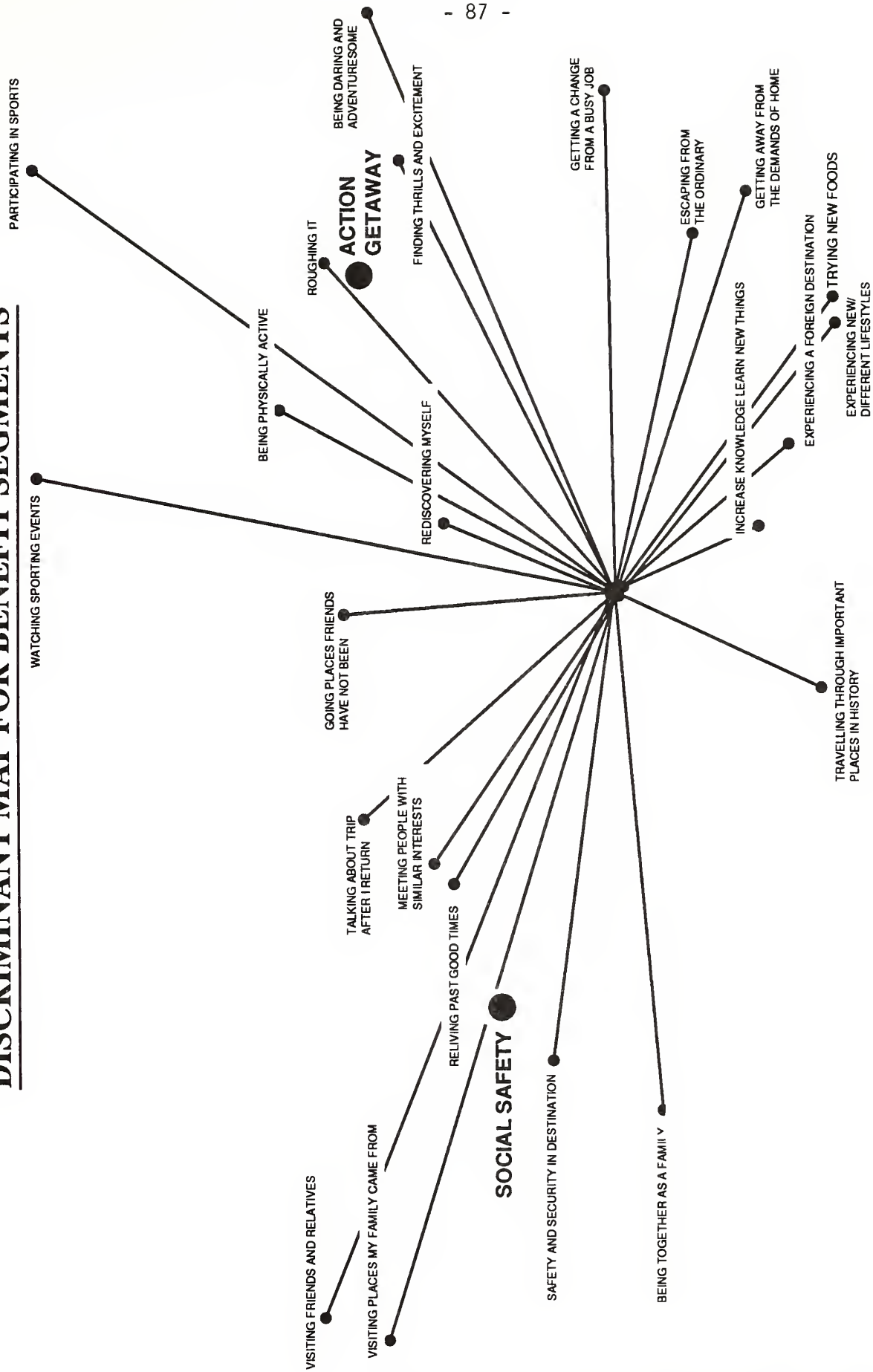
The Action Getaway group is located in the upper right part of the map associated with attributes relating to sports, adventure, and getting away.

The Experiential group at the bottom of the map is associated with such attributes as "traveling through important places in history", "experiencing new and different lifestyles", "trying new foods", and "experiencing a foreign destination".

(Reference: Figure 8)

FIGURE 8

DISCRIMINANT MAP FOR BENEFIT SEGMENTS



6.4 Implications

Action Getaway travelers were the group expressing the most interest in visiting the mainland U.S., and they should therefore be regarded as the most promising segment overall. Accordingly, North America should be positioned as a location where it is possible to find sports and physical activities, and opportunities to be daring and adventuresome, traits desired by these respondents. Given this group's willingness to "rough it", the ample wilderness and outdoors opportunities in both Canada and the U.S. (ranging from sightseeing and scenery to white water rafting and mountain climbing) would be well suited to their needs. Not surprisingly this group tends to be male, and younger.

The Social Safety segment is an older group more likely than average to travel to visit friends and relatives. It is therefore probably the most difficult group to market towards. In other words, any travel decisions would be influenced by where their friends and relatives are actually located, a situation over which a marketer would have little influence.

Experiential travelers represent another promising group. As better educated and discriminating travelers, it would be necessary to convince them that North America offers a different culture, lifestyle and history for them to enjoy. This group currently has a higher than average interest in visiting Europe, so that Canada and the U.S. should be positioned as viable alternatives.

TABLE 39

IMPORTANCE OF BENEFIT STATEMENTS - MEAN SCORES

(Maximum possible = 4.0, minimum possible = 1.0)

	<u>Total</u>
Total respondents	1503
Seeing as much as possible in the time available	3.5
Seeing and experiencing a foreign destination	3.5
Learning new things, increasing knowledge	3.4
Experiencing new and different lifestyles	3.4
Being free to act the way I feel	3.3
Having fun/being entertained	3.3
Trying new foods	3.2
Escaping from the ordinary	3.1
Traveling through places important in history	3.1
Traveling to places feel safe and secure	3.1
Getting a change from a busy job	3.0
Meeting people with similar interests	3.0
Being physically active	3.0
Being together as a family	3.0
Getting away from the demands of home	2.9
Visiting friends and relatives	2.8
Visiting places family came from	2.8
Finding thrills and excitement	2.8
Experiencing a simpler lifestyle	2.7
Talking about the trip after I return home	2.7
Reliving past good times	2.6
Being daring and adventuresome	2.5
Indulging in luxury	2.5
Rediscovering myself	2.3
Going places friends haven't been	2.1
Watching sports events	2.0
Roughing it	2.0
Participating in sports	1.9
Doing nothing at all	1.9

TABLE 40

TRAVEL BENEFIT SEGMENTS

	<u>Deviation from overall statement mean</u>
<u>ACTION GETAWAY (33%)</u>	
Participating in sports	+0.8
Being daring and adventuresome	+0.6
Watching sporting events	+0.5
Finding thrills and excitement	+0.5
Roughing it	+0.5
Being physically active	+0.4
Getting a change from a busy job	+0.4
Traveling to places feel safe and secure	-0.3
Visiting friends and relatives	-0.3
Visiting places my family came from	-0.4
Being together as a family	-0.4
<u>SOCIAL SAFETY (33%)</u>	
Visiting friends and relatives	+0.8
Visiting places my family came from	+0.8
Being together as a family	+0.5
Traveling through places feel safe and secure	+0.5
Reliving past good times	+0.3
Meeting people with similar interests	+0.3
Talking about trip after I return	+0.3
Finding thrills and excitement	-0.3
Experiencing new and different lifestyles	-0.3
Getting away from the demands of home	-0.4
Escaping from the ordinary	-0.4
Trying new foods	-0.4
Getting a change from a busy job	-0.5
Being daring and adventuresome	-0.5
<u>EXPERIENTIAL (34%)</u>	
Trying new foods	+0.3
Experiencing new and different lifestyles	+0.3
Getting away from the demands of home	+0.2
Seeing and experiencing a foreign destination	+0.2
Traveling through places important in history	+0.2
Going places friends haven't been	-0.3
Talking about the trip after I return home	-0.3
Being physically active	-0.3
Visiting places my family came from	-0.4
Visiting friends and relatives	-0.5
Participating in sports	-0.6
Watching sporting events	-0.6

TABLE 41

BENEFIT SEGMENTS - DEMOGRAPHICS

	<u>Total</u>	<u>BENEFIT SEGMENT</u>		
		<u>Action Getaway</u>	<u>Social Safety</u>	<u>Experiential</u>
Total respondents (100%)	1503 %	493 %	490 %	510 %
<u>Sex</u>				
Male	49	(62)	45	39
Female	51	38	55	(61)
<u>Age</u>				
18 - 24 years	13	(25)	7	6
25 - 34 years	23	(36)	11	23
35 - 44 years	22	22	17	26
45 - 54 years	17	8	18	24
55 - 64 years	15	6	(24)	14
65 years or over	11	2	(23)	7
<u>Marital status</u>				
Single	22	(40)	10	15
Married	66	51	(77)	70
Living together	2	2	1	3
Divorced/separated/widowed	10	7	12	11
<u>Occupation</u>				
Owner	4	5	2	5
Manager/executive	7	8	4	10
Professional/technical	20	22	12	25
Clerical/sales	17	21	12	19
Skilled worker	12	17	11	8
Unskilled worker	5	7	5	4
Student	5	8	3	3
Retired	13	4	(24)	10
Homemaker	16	7	(26)	15
<u>City</u>				
Sydney	40	39	40	41
Melbourne	29	29	30	29
Brisbane	10	11	8	11
Adelaide	9	9	11	9
Perth	11	13	11	10

Note: Circled numbers represent those referred to in the main text

TABLE 41 (cont'd)

BENEFIT SEGMENTS - DEMOGRAPHICS

	<u>Total</u>	<u>BENEFIT SEGMENT</u>		
		<u>Action Getaway</u>	<u>Social Safety</u>	<u>Experiential</u>
Total respondents (100%)	1503 %	493 %	490 %	510 %
<u>Education</u>				
Primary	5	2	8	3
Secondary/high school	46	47	48	42
Technical/commercial	27	26	29	24
University/post graduate	23	25	14	30
<u>Life cycle</u>				
Living alone	10	10	10	10
Living with one adult	30	24	36	29
Single with children	7	10	5	5
Couple with children	33	29	31	38
Other	21	27	18	18
<u>Living arrangement</u>				
Live alone	10	10	10	10
Live with children	41	40	37	44
Live without children	49	50	53	46
<u>Mean no. of adults</u>				
<u>18 years or over</u>	<u>2.4</u>	<u>2.5</u>	<u>2.3</u>	<u>2.3</u>
<u>Whether any children under</u>				
<u>18 years in household</u>				
Yes	40	40	37	44
No	60	60	63	56
<u>Household income in Australian dollars</u>				
<u>(1987/1988 financial year)</u>				
Under \$20,000	16	10	24	13
\$20,000 - 29,999	16	18	18	12
\$30,000 - 39,999	16	16	15	17
\$40,000 - 49,999	13	14	11	15
\$50,000+	24	27	15	28
Refused	16	15	17	15

Note: Circled numbers represent those referred to in the main text

TABLE 42

BENEFIT SEGMENTS - TRAVEL CHARACTERISTICS

	<u>Total</u>	<u>BENEFIT SEGMENT</u>		
		<u>Action Getaway</u>	<u>Social Safety</u>	<u>Experiential</u>
Total respondents (100%)	1503	493	490	510
	%	%	%	%
<u>Mean no. of 4+ night pleasure trips in past 3 years</u>	<u>3.7</u>	<u>4.0</u>	<u>3.3</u>	<u>3.8</u>
<u>Destinations visited in past 3 years*</u>				
Australia	36	37	28	43
Outside Australia	93	92	96	93
<u>Destinations visited on two most recent long haul trips**</u>				
Europe/United Kingdom	37	28	(51)	32
Asia	36	37	30	(42)
Mainland U.S. (including Alaska)	16	17	17	15
New Zealand	13	16	11	11
Other South Pacific	10	13	7	10
Hawaii/Guam/Samoa	8	9	6	9
Canada	7	6	9	7
Near/Middle East	5	5	6	4
Africa	2	2	2	3
Mexico	2	2	2	3
West Indies/Caribbean	1	1	-	1
Centra/South America	1	-	-	1

* Based on 1,240 respondents who had actually taken at least one such trip

** Based on 1,548 such trips taken by respondents

Note: Circled numbers represent those referred to in the main text

TABLE 42 (cont'd)

BENEFIT SEGMENTS - TRAVEL CHARACTERISTICS

	<u>Total</u>	<u>BENEFIT SEGMENT</u>		
		<u>Action Getaway</u>	<u>Social Safety</u>	<u>Experiential</u>
Total respondents (100%)	1503 %	493 %	490 %	510 %
<u>One long haul destination most like to visit</u>				
Europe/United Kingdom	41	32	(50)	40
Asia	20	22	12	25
Mainland U.S. (including Alaska)	14	(19)	13	9
Canada	7	7	8	6
New Zealand	5	5	7	4
Africa	4	4	2	6
Central/South America	3	4	1	4
Near/Middle East	2	1	3	1
Hawaii/Guam/Samoa	2	4	1	2
Other South Pacific	2	3	1	2
West Indies/Caribbean	*	*	1	*
Mexico	*	-	*	1

Note: Circled numbers represent those referred to in the main text

* Less than 0.5%

TABLE 42 (cont'd)

BENEFIT SEGMENTS - TRAVEL CHARACTERISTICS

	<u>Total</u>	<u>BENEFIT SEGMENT</u>		
		<u>Action Getaway</u>	<u>Social Safety</u>	<u>Experiential</u>
Total respondents took long haul trip (100%)	1158	356	397	400
	%	%	%	%
<u>Mean no. of nights away on trip</u>	<u>51.7</u>	<u>58.0</u>	<u>54.7</u>	<u>43.3</u>
<u>Season trip was taken</u>				
December to February	21	(28)	15	21
March to May	24	22	26	24
June to August	31	26	(38)	29
September to November	24	24	22	26
<u>Type of trip (Two most recent)</u>				
Visit friends and relatives	35	24	(58)	22
Touring trip	34	36	23	(43)
Resort	12	(17)	7	13
Combined business and pleasure	11	14	7	13
City	5	5	3	7
Outdoor trip	1	2	*	1
Exhibition, special event or theme park	1	2	1	*
Cruise	1	*	*	1
<u>People traveled with</u>				
Wife/husband/girl friend/boy friend	55	46	57	(62)
Traveled alone	20	(24)	21	15
Child(ren)	19	12	21	24
Friends	13	(19)	9	11
Other relatives	6	6	8	6
Father/mother	5	5	5	5
Organized group/club/etc.	4	4	4	5
Business associates/colleagues	2	3	1	3
<u>Mean no. of people in travel party</u>	<u>2.8</u>	<u>2.9</u>	<u>2.6</u>	<u>2.9</u>
<u>Mean no. of children under 18 in travel party</u>	<u>0.7</u>	<u>0.9</u>	<u>0.7</u>	<u>0.6</u>

Note: Circled numbers represent those referred to in the main text

* Less than 0.5%

TABLE 42 (cont'd)

BENEFIT SEGMENTS - TRAVEL CHARACTERISTICS

	<u>Total</u>	<u>BENEFIT SEGMENT</u>		
		<u>Action Getaway</u>	<u>Social Safety</u>	<u>Experiential</u>
Total respondents took long haul trip (100%)	1158 %	356 %	397 %	400 %
<u>Sources of information used in planning</u>				
Travel agent	69	66	71	70
Friends/family	44	43	44	46
Brochures/pamphlets	41	39	32	50
Newspaper/magazine article	17	17	11	23
Airline	15	15	15	17
Books/library	9	9	6	13
Advertisements	8	8	5	10
Tour operator/company	5	6	3	5
Government tourism office/board	5	4	6	7
Embassy/consulate	4	3	3	5
Clubs/associations	4	5	3	3
Personal/previous experience	4	5	4	4
Automobile association	2	2	2	3
Someone else made reservations	2	2	1	2
None	5	6	6	5
<u>Trip type</u>				
All-inclusive guided tour	14	11	13	17
Flight and accommodation package only	30	31	23	35
Guided tour only	5	4	6	6
Independent	51	54	58	43
<u>Where booked</u>				
Travel agent	86	83	86	86
Airline	14	17	13	12
Direct with hotel etc.	10	10	8	11
Tour company/holiday company	2	1	3	2

Note: Circled numbers represent those referred to in the main text

TABLE 42 (cont'd)

BENEFIT SEGMENTS - TRAVEL CHARACTERISTICS

	<u>Total</u>	<u>BENEFIT SEGMENT</u>		
		<u>Action Getaway</u>	<u>Social Safety</u>	<u>Experiential</u>
Total respondents took long haul trip (100%)	1158 %	356 %	397 %	400 %
<u>Number of months before leaving - decided on destination</u>				
2 months or less	33	36	31	32
Over 2 months - 4 months	17	17	18	17
Over 4 months - 6 months	23	24	22	22
Over 6 months - 8 months	4	5	3	5
Over 8 months	23	18	26	25
<u>Number of months before leaving - trip was booked</u>				
1 month or less	29	33	30	26
Over 1 month - 2 months	22	21	24	21
Over 2 months - 3 months	16	18	14	16
Over 3 months - 4 months	9	8	11	9
Over 4 months	24	20	22	(29)
Total trips to U.S. taken by respondents (100%)	250 %	81 %	85 %	84 %
<u>Mode of transportation used within U.S.</u>				
Plane	78	79	80	74
Rented car	41	46	34	43
Bus (between cities)	36	34	40	33
Public transportation (within cities)	33	30	21	(49)
Private car	29	23	33	29
Train	19	24	17	16
Boat	7	4	4	(15)
Camper or RV	2	3	4	-
Total trips taken to Canada by respondents (100%)	108 %	27+ %	43 %	38+ %
<u>Mode of transportation used within Canada</u>				
Plane	48	46	51	46
Private car	37	31	42	35
Public transportation (within cities)	26	35	(15)	32
Bus (between cities)	26	(12)	32	30
Train	25	27	(17)	32
Rented car	24	27	22	24
Boat	12	4	10	(19)
Camper or RV	4	-	7	3

+ Note: small base

Note: Circled numbers represent those referred to in the main text

TABLE 43

BENEFIT SEGMENTS
TOP THREE VACATION DESTINATIONS
INTERESTED IN VISITING - CANADA

	<u>Total</u>	<u>BENEFIT SEGMENT</u>		
		<u>Action Getaway</u>	<u>Social Safety</u>	<u>Experiential</u>
Total respondents (100%)	1503 %	493 %	490 %	510 %
<u>Provinces and Territories</u>				
Newfoundland/Labrador	7	7	6	8
P.E.I.	4	3	3	6
Nova Scotia	8	9	5	8
New Brunswick	1	2	1	1
Quebec	51	53	49	50
Ontario	55	57	55	52
Manitoba	3	2	3	5
Saskatchewan	4	4	4	3
Alberta	35	34	35	34
British Columbia	61	60	64	60
Yukon	17	17	14	20
Northwest Territories	5	5	5	4
<u>Specific Destinations</u>				
Vancouver	35	37	37	32
Montreal	27	31	27	23
Niagara Falls	27	28	25	26
Quebec City	21	22	19	23
Toronto	16	16	19	13
Calgary	15	17	16	12
Banff National Park	13	10	11	17
Rocky Mountains	13	10	14	16
Great Lakes	6	6	6	7
Vancouver Island	5	4	5	7
Klondike National Park	4	4	3	5
Ottawa	4	2	7	4
Edmonton	3	5	2	2

Note: Circled numbers represent those referred to in the main text

TABLE 44

BENEFIT SEGMENTS
TOP THREE VACATION DESTINATIONS
INTERESTED IN VISITING - U.S.A.

	<u>Total</u>	<u>BENEFIT SEGMENT</u>		
		<u>Action Getaway</u>	<u>Social Safety</u>	<u>Experiential</u>
Total respondents (100%)	1503 %	493 %	490 %	510 %
<u>Top States</u>				
California	71	73	75	66
New York	46	48	42	47
Florida	20	21	20	18
Arizona	20	17	20	22
Hawaii	12	11	10	14
Washington D.C.	12	9	14	12
Louisiana	11	10	8	13
Texas	8	8	8	8
Nevada	8	9	8	7
Colorado	7	8	5	7
Illinois	5	2	3	2
Washington	3	3	3	3
Massachusetts	3	5	4	6
Pennsylvania	3	2	3	2
<u>8 Travel Regions</u>				
Travel South	36	36	35	36
Visit U.S. West	84	86	85	79
New England	8	7	7	10
Old West Trail Foundation	9	9	7	11
America's Heartland	13	11	12	15
Foremost West	33	32	29	36
George Washington Country	16	12	20	16
Great Lakes	5	6	5	3

Note: Circled numbers represent those referred to in the main text

TABLE 44 (cont'd)

BENEFIT SEGMENTS
TOP THREE VACATION DESTINATIONS
INTERESTED IN VISITING - U.S.A.

	<u>Total</u>	<u>BENEFIT SEGMENT</u>		
		<u>Action Getaway</u>	<u>Social Safety</u>	<u>Experiential</u>
Total respondents (100%)	1503 %	493 %	490 %	510 %
<u>11 Census Divisions</u>				
West North Central	3	4	2	2
East South Central	4	4	5	3
New England	8	7	7	10
Middle Atlantic	48	49	44	49
Middle Atlantic (excluding N.Y.)	3	2	4	3
East North Central	4	5	5	3
South Atlantic	33	32	36	32
South Atlantic (excluding Florida)	16	13	19	16
West South Central	19	18	18	20
Mountain	40	40	36	42
Pacific	76	78	79	72
Pacific (excluding California)	8	7	7	10
Pacific Islands	12	11	10	14
Atlantic Islands	*	1	-	-
<u>Specific Destinations</u>				
New York City	38	42	33	40
Disneyland	22	21	26	20
San Francisco	18	16	18	21
Los Angeles	18	20	18	15
Grand Canyon National Park	17	14	17	19
New Orleans	10	9	7	12
Yellowstone National Park	6	6	5	8
Boston	5	5	4	5
Niagara Falls	5	4	5	5
Las Vegas	5	6	6	5
Rockies	4	5	3	4

Note: Circled numbers represent those referred to in the main text

TABLE 45

BENEFIT SEGMENTS - MEDIA READERSHIP

	<u>Total</u>	<u>BENEFIT SEGMENT</u>		
		<u>Action Getaway</u>	<u>Social Safety</u>	<u>Experiential</u>
Total respondents (100%)	1503	493	490	510
	%	%	%	%
<u>Top 5 daily newspapers</u>				
Sydney Morning Herald	21	24	18	23
The Age	16	16	14	18
The Sun	15	17	15	13
Daily Telegraph	13	14	13	11
The Herald	9	9	9	10
Western Australian	9	11	9	8
<u>Top 5 Sunday papers</u>				
Sun-Herald	22	22	22	23
Sunday Telegraph	18	19	17	18
Sunday Mail	12	13	12	12
Weekend Australian	9	9	7	12
Sunday Times	9	11	10	7
<u>Top 5 weekly magazines</u>				
New Idea	26	20	31	29
TV Week	22	26	20	20
Woman's Day	18	13	21	21
Bulletin/Newsweek	12	12	8	15
Time	10	9	7	13
<u>Top 5 monthly magazines</u>				
Australian Women's Weekly	26	20	31	27
Reader's Digest	15	12	20	15
House and Garden	12	9	12	13
Better Homes and Gardens	11	9	12	14
Family Circle	9	5	10	12

Note: Circled numbers represent those referred to in the main text

7. PRODUCT SEGMENTS

7.1 Overview

This analysis was conducted based on the importance ratings given to a list of 52 activities, features and amenities that might be found at a vacation destination.

Generally speaking, comfort, cleanliness and safety were important product needs as high ratings were given to personal safety (3.6), hygiene and cleanliness (3.5), public transportation (3.4), warm, sunny climate (3.2), reliable weather (3.2), and the environmental quality of the air, water and soil (3.0).

The outdoors orientation of Australian travelers was indicated by the high ratings given to outstanding scenery (3.4), wilderness and nature (3.0), national parks and forests (3.0), wildlife or birds (3.0), and lakes and rivers (3.0).

Respondents were also interested in the "people" part of travel as some of the more highly rated items included interesting and friendly local people (3.6), interesting smaller towns and villages (3.3), warm welcome for tourists (3.3), and culture different from my own (3.2).

Sports activities tended to be among the items rated as least important e.g. hunting (1.5), snow skiing (1.8), golf and tennis (1.8), and fishing (1.8).

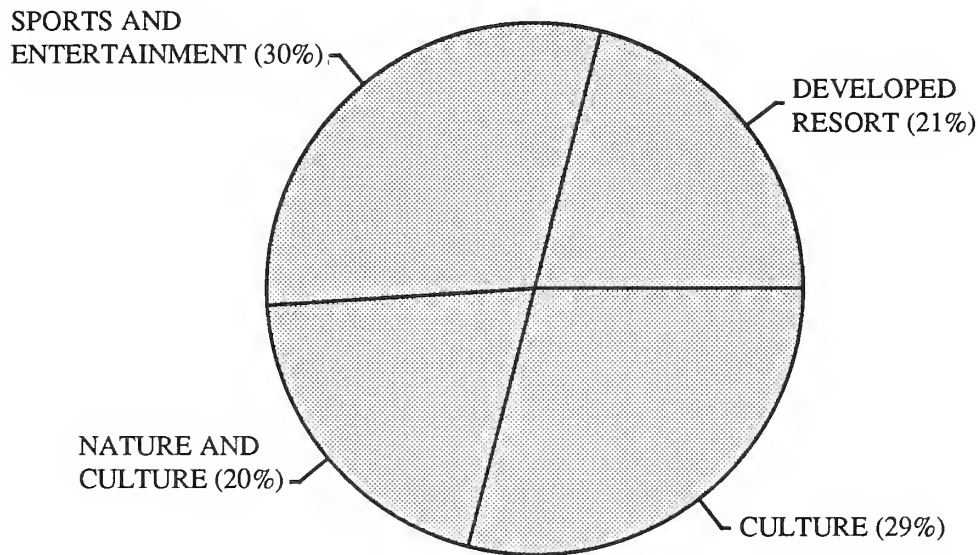
(Reference: Table 46)

7.2 Segments

The analysis yielded four different product segments:

FIGURE 9

PRODUCT SEGMENTS



Based on total sample of 1,503 respondents

The following comparative descriptions present the distinguishing characteristics of each group:

Developed Resort traveler (21%)

- This group (like the Sports and Entertainment group described on the next page) enjoys nightlife and entertainment activities. The difference, however, is that travelers in this group are more likely to want a destination with well developed facilities (i.e. first class hotels, high quality and/or fast food restaurants, shopping) as well as the attractions of a warm weather resort (i.e. beaches for swimming and sunning, reliable weather, and a warm, sunny climate). These travelers place less importance on the scenery and cultural aspects of their destination, and instead are more interested in the entertainment and other facilities available.

Culture
traveler
(29%)

- This segment has an above average interest in seeing historical, archeological or military sites, museums and art galleries, and historic old cities. If possible, they prefer to have these features easily accessible. For example, they are interested in the availability of a variety of short guided tours, and in destinations which are manageable enough in size to be able to see everything.

Nature and
Culture
traveler
(20%)

- Respondents in this segment are mainly interested in product items related to nature and the outdoors e.g. hiking, climbing, wilderness, nature, wildlife and birds, national parks and forests, wide open spaces, and mountainous areas. In addition, these travelers share an interest in unique and different cultural groups and in cultures different from their own. They are also interested in such features as museums and art galleries, and historical, archeological or military sites. Not surprisingly, these travelers do not prefer product items derived from big city or resort travel such as first class hotels, high quality restaurants, etc.

Sports and
Entertainment
traveler
(30%)

- This segment gave comparatively high ratings to a number of sports related product items (e.g. water sports, snow skiing, fishing, hunting, golf and tennis), as well as to a number of entertainment related items (spectator sporting events, nightlife and entertainment, casinos and gambling, amusement and theme parks). They seem generally to like the outdoors, whether it is for activities such as hiking or climbing, or seaside and beaches for swimming and sunning.

(Reference: Table 47)

7.3 Segment profiles

The following characteristics disproportionately describe each product segment:

Developed Resort traveler

- More likely than average to be:
 - secondary/high school educated
- More likely than average to have:
 - visited Hawaii/Guam/Samoa in the past three years
- More likely than average to be:
 - interested in visiting the mainland U.S.
- More likely than average to be interested in:
 - visiting Montreal and Niagara Falls in Canada
 - visiting California (Disneyland, Los Angeles), Florida, Hawaii, and Nevada (Las Vegas) in the U.S.
 - visiting the Pacific Islands census division
- More likely than average to read The Sun, Daily Telegraph, Sunday Telegraph, New Idea, TV Week, Woman's Day, and Australian Women's Week

Culture traveler

- More likely than average to be:
 - female
 - older (55 years of age or over)
 - married
 - retired or a homemaker
 - living with one adult
 - lower income
- More likely than average to have:
 - traveled with a wife/husband/girl/boy friend
 - taken an all-inclusive guided tour
 - booked their trip further in advance
- More likely than average to be interested in:
 - visiting Europe
 - visiting Arizona and Washington, D.C. in the U.S.
 - visiting George Washington Country
- More likely than average to read New Idea, Woman's Day, Australian Women's Week, and Reader's Digest

Nature and
Culture
traveler

- More likely than average to be:
 - young (18-34 years of age)
 - single
 - in a professional/technical occupation
 - university educated
- More likely than average to have:
 - spent more nights away on a trip
 - traveled in winter (i.e. Australian summer)
 - traveled alone
 - used newspaper/magazine articles or books/library when planning their trip
 - taken an independent type of trip
 - booked their accommodation directly with the hotel
- More likely than average to be interested in:
 - visiting Central or South America
 - visiting the Yukon in Canada
 - visiting Arizona (Grand Canyon National Park), Louisiana (New Orleans), Colorado, the Old West Trail Foundation and Foremost West travel regions, the Mountain and Pacific (excluding California) census divisions, and Yellowstone National Park in the U.S.
- More likely than average to read the Sydney Morning Herald, Weekend Australian, and Time

Sports and
Entertainment
traveler

- More likely than average to be:
 - male
 - young (18-34 years of age)
 - single (30%)
 - living in a household with children
- More likely than average to have:
 - visited other South Pacific destinations in the past three years
 - traveled by rented car and train within the U.S.
 - traveled by rented car within Canada
- More likely than average to be:
 - interested in visiting the U.S. mainland
- More likely than average to read the Sunday Telegraph

(Reference: Tables 48 to 52)

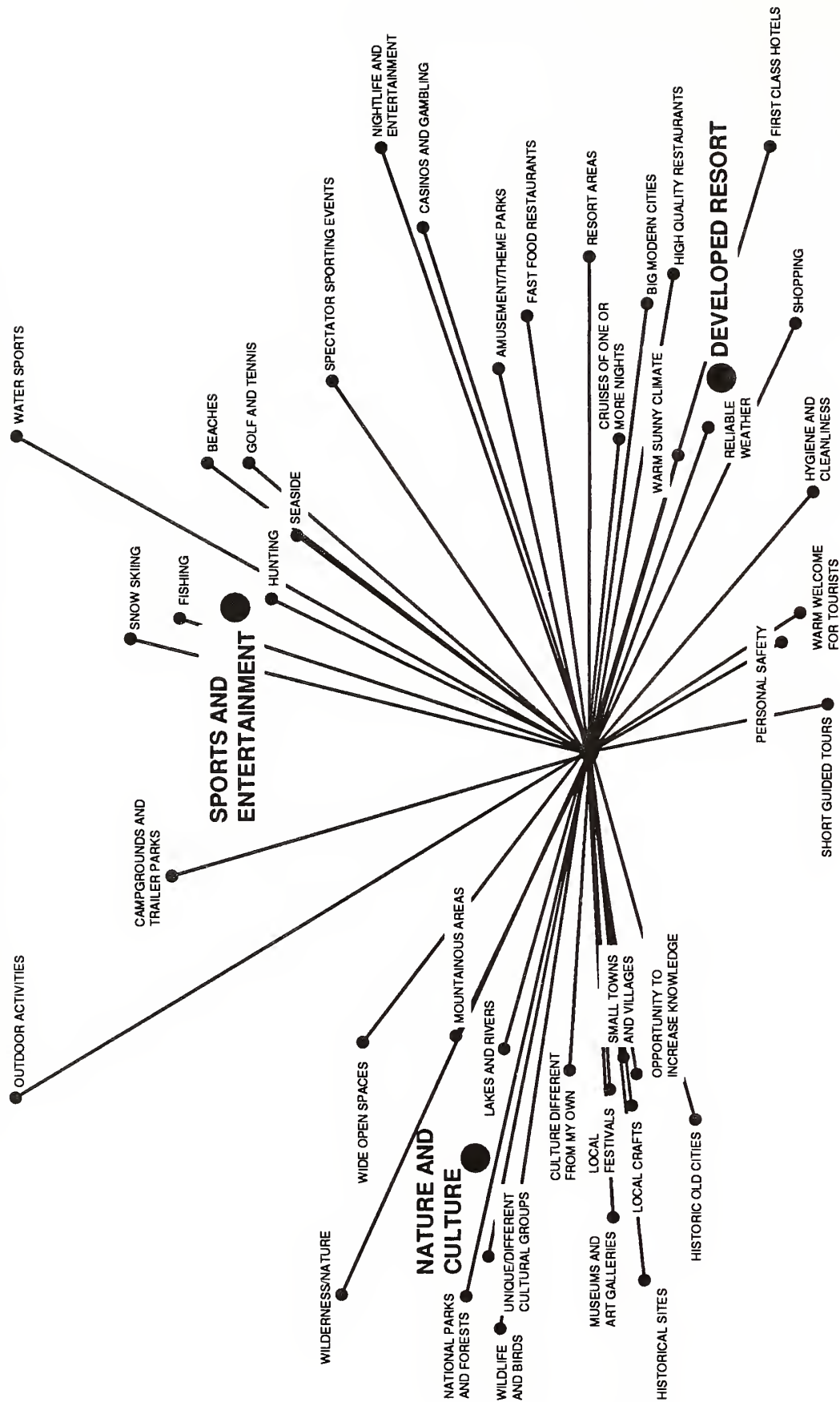
A visual summary of the differences among the segments was again produced on a discriminant map. The two dimensions shown on the map accounted for 94% of the variance among the segment groups. Once more it should be noted that only the attributes with the longest lines (i.e. the ones with the most discriminating ability) are shown on the map.

The Developed Resort group is situated in a position associated with such attributes as reliable weather, shopping, first class hotels, high quality restaurants, big modern cities and resort areas. It also shares an association with the Sports and Entertainment group in terms of nightlife and entertainment and casinos and gambling. The Sports and Entertainment group is in turn associated with a variety of sports such as snow skiing, water sports, and golf and tennis.

The Nature and Culture group is positioned on the left side of the map in the same area as wilderness/nature, national parks and forests, wildlife and birds, and so on. It also shares an association with the Culture group in terms of such attributes as museums and art galleries, historical sites and historic old cities. The Culture group is in turn associated with short guided tours, and strongly dissociated with sports activities.

(Reference: Figure 10)

FIGURE 10
DISCRIMINANT MAP FOR PRODUCT SEGMENTS



CULTURE

7.4 Product segments vs. travel philosophy and benefit segments

Further insight into the product segments can be obtained by profiling them with respect to the travel philosophy and benefit segments. This reveals that the product segments are more likely than average to be represented as follows:

	<u>Travel philosophy</u>	<u>Benefit</u>
<u>Developed Resort</u>	Touring Package Guarded	No particular segment
<u>Culture</u>	Touring Package	Social Safety Experiential
<u>Nature and Culture</u>	Budget Independent	Experiential
<u>Sports and Entertainment</u>	Guarded	Action Getaway

(Reference: Table 53)

7.5 Implications

The marketing implications for each of the four product segments are discussed below in turn.

Developed Resort

- This group would be more of a target for the U.S. than Canada. Travelers in this segment expressed greater than average interest in destinations such as Hawaii, California, Florida and Nevada. It is therefore evident that a number of destinations in the U.S. would be able to provide the entertainment, sunshine and tourist facilities that are of most interest to this group. As they are disproportionately likely to be Touring Package travelers, this is one product segment that should be kept in mind when tailoring package travel to meet specific needs.

Culture

- North America is a destination that would be able to offer the features such as historical sites, museums and art galleries which are sought by this group. This group is made up disproportionately of Touring Package travelers. Accordingly improvements in package travel to both Canada and the U.S., as discussed earlier, would also be of benefit to this segment. In designing packages to meet their needs, the female and older nature of this group should be kept in mind.

Nature and Culture

- The abundant natural and outdoor opportunities of Canada and the U.S. would be of direct interest to this group. In a number of cases there would also be a cross appeal with the culture side of this group e.g. Wild West, Gold Rush, etc. As Experiential travelers, people in this group are more interested in seeing and discovering a destination than they necessarily are in the facilities they find there. As Budget Independent travelers it is enough to motivate them to see Canada and the U.S., and they will then find their own way over without further help. This is a young, single and well educated group.

Sports and Entertainment

- This segment is already more interested than average in visiting the mainland U.S. This is a young, male and single group that falls disproportionately in the Action Getaway segment. It is apparent that the U.S. offers the fast paced entertainment and sports activities sought after by this group. This group may have an overlapping interest in some of the packages designed for the Developed Resort segment above.

TABLE 46

IMPORTANCE OF PRODUCT STATEMENTS - MEAN SCORES

(Maximum possible = 4.0, minimum possible = 1.0)

	<u>Total</u>
Total respondents	1503
Personal safety	3.6
Interesting and friendly local people	3.6
Outstanding scenery	3.5
Hygiene and cleanliness	3.5
Opportunities to increase knowledge	3.4
Public transportation	3.4
Interesting smaller towns and villages	3.3
Inexpensive travel in destination	3.3
Warm welcome for tourists	3.3
Warm, sunny climate	3.2
Culture different from my own	3.2
Reliable weather	3.2
Local cuisine	3.2
Historic old cities	3.1
Inexpensive restaurants	3.1
Environmental quality of air, water and soil	3.0
Wilderness and nature	3.0
National parks and forests	3.0
Wildlife or birds	3.0
Manageable size to see	3.0
Lakes and rivers	3.0
Budget accommodation	3.0
Good shopping	3.0
Wide open spaces	2.9
Variety of short guided tours	2.9
Museums and art galleries	2.9

TABLE 46 (cont'd)

IMPORTANCE OF PRODUCT STATEMENTS - MEAN SCORES

(Maximum possible = 4.0, minimum possible = 1.0)

	<u>Total</u>
Total respondents	1503
Local crafts	2.9
Local festivals	2.9
Good beaches for swimming and sunning	2.8
Unique cultural groups (Eskimo, Amish, etc.)	2.8
Mountainous areas	2.8
Historical, archeological, or military sites	2.8
Seaside	2.7
Exotic atmosphere	2.7
Live theatre and concerts	2.7
Resort areas	2.6
High quality restaurants	2.5
First class hotels	2.5
Nightlife and entertainment	2.4
Cruises of one or more nights	2.3
Outdoor activities such as hiking, climbing	2.2
Amusement or theme parks	2.2
Big modern cities	2.2
Fast food restaurants	2.1
Water sports	2.0
Spectator sporting events	2.0
Campgrounds and trailer parks	1.9
Casinos and gambling	1.8
Good fishing	1.8
Golf and tennis	1.8
Snow skiing	1.7
Good hunting	1.5

TABLE 47

TRAVEL PRODUCT SEGMENTS

	<u>Deviation from overall statement mean</u>
<u>DEVELOPED RESORT (22%)</u>	
Nightlife and entertainment	+0.6
Casinos and gambling	+0.5
Shopping	+0.5
First class hotels	+0.4
High quality restaurants	+0.4
Resort areas	+0.4
Large modern cities	+0.4
Fast food restaurants	+0.4
Beaches for swimming and sunning	+0.3
Amusement or theme parks	+0.3
Reliable weather	+0.3
Warm, sunny climate	+0.3
Interesting small towns and villages	-0.3
Culture different from my own	-0.3
Campgrounds and trailer parks	-0.3
Local festivals	-0.3
Opportunities to increase one's knowledge	-0.4
Lakes and rivers	-0.4
Wide open spaces to get away from crowds	-0.4
Mountainous areas	-0.4
Historic old cities	-0.4
Local crafts and handiwork	-0.4
Museums and art galleries	-0.5
Outdoor activities such as hiking and climbing	-0.5
Unique and different cultural groups	-0.6
Wilderness and undisturbed nature	-0.7
Historical, archeological, or military sites	-0.7
National parks and forests	-0.7
Chance to see wildlife/birds	-0.8

TABLE 47 (cont'd)

TRAVEL PRODUCT SEGMENTS

	<u>Deviation from overall statement mean</u>
<u>CULTURE (29%)</u>	
Historical, archeological, or military sites	+0.4
Museums and art galleries	+0.3
Historical old cities	+0.3
Standards of hygiene and cleanliness	+0.3
Variety of short guided tours	+0.3
Manageable size/able to see everything	+0.3
Spectator sporting events	-0.3
Hunting	-0.3
Fishing	-0.4
Campgrounds and trailer parks	-0.4
Casinos and gambling	-0.4
Golf and tennis	-0.4
Seaside	-0.5
Nightlife and entertainment	-0.5
Snow skiing	-0.5
Beaches for swimming and sunning	-0.6
Outdoor activities such as hiking and climbing	-0.6
Water sports	-0.7

TABLE 47 (cont'd)

TRAVEL PRODUCT SEGMENTS

	<u>Deviation from overall statement mean</u>
<u>NATURE AND CULTURE (20%)</u>	
Outdoor activities such as hiking and climbing	+0.6
Wilderness and undisturbed nature	+0.6
Unique and different cultural groups	+0.5
Chance to see wildlife and birds	+0.5
National parks and forests	+0.5
Culture different from my own	+0.4
Wide open spaces to get away from crowds	+0.4
Museums and art galleries	+0.4
Historical, archeological, or military sites	+0.4
Mountainous areas	+0.3
Local festivals	+0.3
Inexpensive restaurants	+0.3
Warm, sunny climate	-0.4
Amusement or theme parks	-0.4
Reliable weather	-0.4
Spectator sporting events	-0.5
Shopping	-0.5
Casinos and gambling	-0.5
Nightlife and entertainment	-0.5
Standards of hygiene and cleanliness	-0.5
Fast food restaurants	-0.5
Cruises of one or more nights	-0.5
Resort areas	-0.6
Large modern cities	-0.6
High quality restaurants	-0.7
First class hotels	-0.9

TABLE 47 (cont'd)

TRAVEL PRODUCT SEGMENTS

	<u>Deviation from overall statement mean</u>
<u>SPORTS AND ENTERTAINMENT (30%)</u>	
Water sports	+0.8
Snow skiing	+0.6
Fishing	+0.6
Golf and tennis	+0.6
Hunting	+0.5
Spectator sporting events	+0.5
Outdoor activities such as hiking, climbing	+0.5
Campgrounds and trailer parks	+0.4
Nightlife and entertainment	+0.4
Beaches for sunning and swimming	+0.4
Casinos and gambling	+0.4
Amusement or theme parks	+0.3
Seaside	+0.3
Warm welcome for tourists	-0.2
Personal safety	-0.2
Inexpensive restaurants	-0.2
Interesting and friendly local people	-0.2
Variety of short guided tours	-0.2
Public transportation	-0.2
Historic old cities	-0.2
Inexpensive travel in destination	-0.2

TABLE 48

PRODUCT SEGMENTS - DEMOGRAPHICS

	<u>Total</u>	<u>PRODUCT SEGMENT</u>			
		<u>Developed Resort</u>	<u>Culture</u>	<u>Nature & Culture</u>	<u>Sports & Entertain- ment</u>
Total respondents (100%)	1503 %	322 %	435 %	295 %	445 %
<u>Sex</u>					
Male	49	45	40	46	(61)
Female	51	55	(60)	54	39
<u>Age</u>					
18 - 24 years	13	18	2	(12)	(19)
25 - 34 years	23	22	11	(34)	(30)
35 - 44 years	22	21	18	22	26
45 - 54 years	17	16	21	16	13
55 - 64 years	15	12	(25)	10	9
65 years or over	11	11	(23)	5	3
<u>Marital status</u>					
Single	22	23	7	(29)	(30)
Married	66	65	(78)	55	62
Living together	2	3	1	3	1
Divorced/separated/widowed	10	8	13	12	6
<u>Occupation</u>					
Owner	4	6	4	2	4
Manager/executive	7	7	5	6	11
Professional/technical	20	10	17	(34)	20
Clerical/sales	17	23	13	18	17
Skilled worker	12	10	7	12	18
Unskilled worker	5	8	3	4	6
Student	5	6	1	7	6
Retired	13	12	(25)	6	5
Homemaker	16	18	(24)	10	12
<u>City</u>					
Sydney	40	41	38	40	40
Melbourne	29	33	28	29	29
Brisbane	10	6	12	9	12
Adelaide	9	9	12	13	5
Perth	11	11	11	10	14

Note: Circled numbers represent those referred to in the main text

TABLE 48 (cont'd)

PRODUCT SEGMENTS - DEMOGRAPHICS

	Total	PRODUCT SEGMENT			
		Developed Resort	Culture	Nature & Culture	Sports & Entertain- ment
Total respondents (100%)	1503 %	322 %	435 %	295 %	445 %
<u>Education</u>					
Primary	5	5	7	3	3
Secondary/high school	46	(60)	46	29	47
Technical/commercial	27	23	29	25	29
University/post graduate	23	13	18	(43)	22
<u>Life cycle</u>					
Living alone	10	7	13	14	7
Living with one adult	30	28	(36)	31	24
Single with children	7	7	2	7	11
Couple with children	33	33	30	32	36
Other	21	26	19	17	23
<u>Living arrangement</u>					
Live alone	10	7	13	14	7
Live with children	41	40	33	39	(49)
Live without children	49	53	54	47	44
<u>Mean no. of adults</u>					
<u>18 years or over</u>	<u>2.4</u>	<u>2.5</u>	<u>2.3</u>	<u>2.3</u>	<u>2.5</u>
<u>Whether any children</u>					
<u>under 18 years in household</u>					
Yes	41	40	33	39	(49)
No	59	60	67	61	51
<u>Household income in Australian</u>					
<u>dollars (1987/88 financial year)</u>					
Under \$20,000	16	16	(23)	13	11
\$20,000 - 29,999	16	17	15	13	17
\$30,000 - 39,999	16	16	16	17	15
\$40,000 - 49,999	13	12	11	18	14
\$50,000+	24	21	18	26	28
Refused	16	18	18	13	15

Note: Circled numbers represent those referred to in the main text

* Less than 0.5%

TABLE 49

PRODUCT SEGMENTS - TRAVEL CHARACTERISTICS

	<u>Total</u>	<u>PRODUCT SEGMENT</u>			
		<u>Developed Resort</u>	<u>Culture</u>	<u>Nature & Culture</u>	<u>Sports & Entertain- ment</u>
Total respondents (100%)	1503	322	435	295	445
	%	%	%	%	%
<u>Mean no. of 4+ night pleasure trips in past 3 years</u>	<u>3.7</u>	<u>3.5</u>	<u>3.3</u>	<u>4.1</u>	<u>4.0</u>
<u>Destinations visited in past 3 years**</u>					
Australia	36	34	33	42	37
Outside Australia	93	94	95	93	92
<u>Destinations visited on two most recent long haul trips***</u>					
Europe/United Kingdom	37	35	40	41	31
Asia	36	41	40	33	30
Mainland U.S. (including Alaska)	16	19	14	16	17
New Zealand	13	8	12	15	16
Other South Pacific	10	9	6	9	(15)
Hawaii/Guam/Samoa	8	(12)	7	4	9
Canada	7	5	8	7	7
Near/Middle East	5	5	3	8	4
Mexico	2	3	2	3	1
West Indies/Caribbean	1	*	*	1	1
Central/South America	1	1	*	1	*

* Less than 0.5%

** Based on 1,240 respondents who had actually taken at least one such trip

*** Based on 1,548 such trips taken by respondents

Note: Circled numbers represent those referred to in the main text

TABLE 49 (cont'd)

PRODUCT SEGMENTS - TRAVEL CHARACTERISTICS

	<u>Total</u>	<u>PRODUCT SEGMENT</u>			
		<u>Developed Resort</u>	<u>Culture</u>	<u>Nature & Culture</u>	<u>Sports & Entertain- ment</u>
Total respondents (100%)	1503 %	322 %	435 %	295 %	445 %
<u>One long haul destination most like to visit</u>					
Europe/United Kingdom	41	38	(50)	37	35
Asia	20	20	17	24	19
Mainland U.S. (including Alaska)	14	(17)	11	8	(18)
Canada	7	6	8	5	8
New Zealand	5	4	5	5	7
Africa	4	3	4	5	4
Central/South America	3	1	1	(8)	3
Near/Middle East	2	2	1	2	2
Hawaii/Guam/Samoa	2	3	2	1	3
Other South Pacific	2	3	1	3	2
West Indies/Caribbean	*	1	*	*	1
Mexico	*	1	-	1	-

Note: Circled numbers represent those referred to in the main text

* Less than 0.5%

TABLE 49 (cont'd)

PRODUCT SEGMENTS - TRAVEL CHARACTERISTICS

	<u>Total</u>	<u>PRODUCT SEGMENT</u>			
		<u>Developed Resort</u>	<u>Culture</u>	<u>Nature & Culture</u>	<u>Sports & Entertain- ment</u>
Total respondents took long haul trip (100%)	1158 %	260 %	363 %	223 %	307 %
<u>Mean no. of nights away on trip</u>	<u>51.7</u>	<u>52.9</u>	<u>46.4</u>	<u>68.1</u>	<u>46.0</u>
<u>Season trip was taken</u>					
December to February	21	18	17	33	20
March to May	24	24	24	24	25
June to August	31	31	36	23	32
September to November	24	27	23	20	23
<u>Type of trip (Two most recent)</u>					
Visit friends and relatives	35	34	37	34	34
Touring trip	34	31	39	37	29
Resort	12	16	8	10	16
Combined business and pleasure	11	11	11	11	13
City	5	6	4	5	4
Outdoor trip	1	-	*	3	1
Exhibition, special event or theme park	1	1	*	1	1
Cruise	1	1	1	-	1
<u>People traveled with</u>					
Wife/husband/girl friend/boy friend	55	55	62	48	53
Traveled alone	20	19	15	28	22
Child(ren)	19	24	18	19	17
Friends	13	15	11	11	14
Other relatives	6	7	5	5	8
Father/mother	5	5	4	5	6
Organized group/club/etc.	4	3	6	5	2
Business associates/colleagues	2	2	3	1	3
<u>Mean no. of people in travel party</u>	<u>2.8</u>	<u>2.9</u>	<u>2.8</u>	<u>2.7</u>	<u>2.9</u>
<u>Mean no. of children under 18 in travel party</u>	<u>0.7</u>	<u>0.8</u>	<u>0.6</u>	<u>0.8</u>	<u>0.8</u>

Note: Circled numbers represent those referred to in the main text

* Less than 0.5%

TABLE 49 (cont'd)

PRODUCT SEGMENTS - TRAVEL CHARACTERISTICS

	<u>Total</u>	<u>PRODUCT SEGMENT</u>			
		<u>Developed Resort</u>	<u>Culture</u>	<u>Nature & Culture</u>	<u>Sports & Entertain- ment</u>
Total respondents took long haul trip (100%)	1158 %	260 %	363 %	223 %	307 %
<u>Sources of information used in planning</u>					
Travel agent	69	69	72	62	72
Friends/family	44	47	44	47	41
Brochures/pamphlets	41	39	43	39	41
Newspaper/magazine article	17	14	17	(25)	14
Airline	15	18	12	18	15
Books/library	9	3	9	(23)	5
Advertisements	8	10	8	7	6
Tour operator/company	5	4	4	5	6
Government tourism office/board	5	2	8	6	5
Embassy/consulate	4	3	4	7	2
Clubs/association	4	4	4	4	3
Automobile Association	2	*	3	4	2
<u>Trip package</u>					
Independent	51	48	42	(66)	55
Flight and accommodation package only	30	34	30	21	32
All-inclusive guided tour	14	14	(22)	6	9
Guided tour only	5	5	5	8	4
<u>Where booked</u>					
Travel agent	86	83	88	82	88
Airline	14	15	12	16	14
Direct with hotel etc.	10	12	6	(17)	6
Tour company/holiday company	2	2	3	1	2

Note: Circled numbers represent those referred to in the main text

* Less than 0.5%

TABLE 49 (cont'd)

PRODUCT SEGMENTS - TRAVEL CHARACTERISTICS

	<u>Total</u>	<u>PRODUCT SEGMENT</u>			
		<u>Developed Resort</u>	<u>Culture</u>	<u>Nature & Culture</u>	<u>Sports & Entertain- ment</u>
Total respondents took long haul trip (100%)	1158 %	260 %	363 %	223 %	307 %
<u>Number of months before leaving - decided on destination</u>					
2 months or less	33	32	31	34	35
Over 2 months - 4 months	17	17	18	14	18
Over 4 months - 6 months	23	25	20	23	24
Over 6 months - 8 months	4	4	5	4	4
Over 8 months	23	22	25	25	20
<u>Number of months before leaving - trip was booked</u>					
1 month or less	29	33	23	33	31
Over 1 month - 2 months	22	18	24	18	26
Over 2 months - 3 months	16	14	15	16	17
Over 3 months - 4 months	9	11	9	12	7
Over 4 months	24	25	(28)	22	20
Total trips to U.S. taken by respondents (100%)	250 %	66 %	66 %	47 %	71 %
<u>Mode of transportation used within U.S.</u>					
Plane	78	73	86	76	75
Rented car	41	39	32	28	(58)
Bus (between cities)	36	32	37	37	38
Public transportation (within cities)	33	29	37	44	28
Private car	29	26	28	37	26
Train	19	11	14	24	(28)
Boat	7	5	5	15	7
Camper or RV	2	-	-	2	6
Total trips to Canada taken by respondents (100%)	108 %	17+ %	39+ %	20+ %	29+ %
<u>Mode of transportation used within Canada</u>					
Plane	48	47	55	40	45
Private car	37	35	34	35	41
Public transportation (within cities)	26	29	18	30	31
Bus (between cities)	26	24	32	25	21
Train	25	29	29	25	17
Rented car	24	18	21	10	(41)
Boat	12	6	16	20	3
Camper or RV	4	-	-	10	7

+ Note: small base

Note: Circled numbers represent those referred to in the main text

TABLE 50

PRODUCT SEGMENTS
TOP THREE VACATION DESTINATIONS
INTERESTED IN VISITING - CANADA

	<u>Total</u>	<u>PRODUCT SEGMENT</u>			
		<u>Developed Resort</u>	<u>Culture</u>	<u>Nature & Culture</u>	<u>Sports & Entertain- ment</u>
Total respondents (100%)	1503	322	435	295	445
	%	%	%	%	%
<u>Provinces and Territories</u>					
Newfoundland/Labrador	7	7	5	10	7
P.E.I.	4	2	5	9	1
Nova Scotia	8	8	6	14	5
New Brunswick	1	1	1	1	1
Quebec	51	56	50	43	54
Ontario	55	61	52	46	59
Manitoba	4	4	3	4	3
Saskatchewan	4	4	6	2	4
Alberta	35	34	34	33	36
British Columbia	61	62	62	62	59
Yukon	17	10	19	(23)	15
Northwest Territories	5	2	4	7	5
<u>Specific Destinations</u>					
Vancouver	35	39	35	32	34
Montreal	27	(36)	24	18	29
Niagara Falls	27	(34)	25	20	28
Quebec City	21	20	23	16	25
Toronto	16	15	15	11	21
Calgary	15	17	13	11	18
Rocky Mountains	13	8	18	15	11
Banff National Park	13	10	16	16	10
Great Lakes	6	3	6	9	6
Vancouver Island	5	6	4	6	5
Klondike National Park	4	1	5	6	4
Ottawa	4	5	6	5	2
Edmonton	3	5	1	3	4

Note: Circled numbers represent those referred to in the main text

TABLE 51

PRODUCT SEGMENTS
TOP THREE VACATION DESTINATIONS
INTERESTED IN VISITING - U.S.A.

	<u>Total</u>	<u>PRODUCT SEGMENT</u>			
		<u>Developed Resort</u>	<u>Culture</u>	<u>Nature & Culture</u>	<u>Sports & Entertain- ment</u>
Total respondents (100%)	1503 %	322 %	435 %	295 %	445 %
<u>Top States</u>					
California	71	(81)	71	57	74
New York	46	43	43	48	49
Florida	20	(27)	17	13	21
Arizona	20	13	(24)	(27)	16
Hawaii	12	(17)	10	10	11
Washington D.C.	12	9	(16)	11	10
Louisiana	11	8	10	(15)	10
Texas	8	7	8	7	9
Nevada	8	(13)	6	4	8
Colorado	7	3	6	(11)	7
Massachusetts	5	4	6	6	4
Washington	3	2	3	4	4
Illinois	3	3	3	2	3
Pennsylvania	3	1	4	2	2
<u>8 Travel Regions</u>					
Travel South	36	42	34	32	35
Visit U.S. West	84	88	82	78	85
New England	8	5	9	12	7
Old West Trail Foundation	9	3	11	(17)	7
America's Heartland	13	10	12	17	12
Foremost West	33	21	35	(48)	29
George Washington Country	16	11	(22)	15	14
Great Lakes	5	5	5	4	5

Note: Circled numbers represent those referred to in the main text

TABLE 51 (cont'd)

PRODUCT SEGMENTS
TOP THREE VACATION DESTINATIONS
INTERESTED IN VISITING - U.S.A.

	Total	PRODUCT SEGMENT			
		Developed Resort	Culture	Nature & Culture	Sports & Entertain- ment
Total respondents (100%)	1503 %	322 %	435 %	295 %	445 %
<u>11 Census Divisions</u>					
West North Central	3	3	3	4	2
East South Central	4	6	4	2	5
New England	8	5	9	12	7
Middle Atlantic	48	44	45	50	51
Middle Atlantic (excluding N.Y.)	3	2	4	2	3
East North Central	4	5	5	3	5
South Atlantic	33	37	35	27	34
South Atlantic (excluding Florida)	16	13	21	15	15
West South Central	19	14	19	23	20
Mountain	40	31	41	(51)	37
Pacific	76	82	75	66	79
Pacific (excluding California)	8	3	9	(14)	8
Pacific Islands	12	(17)	10	10	11
Atlantic Islands	*	-	-	1	*
<u>Specific Destinations</u>					
New York City	38	36	35	42	40
Disneyland	22	(29)	24	14	22
San Francisco	18	20	22	14	17
Los Angeles	18	(28)	14	10	19
Grand Canyon National Park	17	10	20	(25)	13
New Orleans	10	7	9	15	9
Yellowstone National Park	6	1	8	(11)	5
Boston	5	4	5	5	4
Niagara Falls	5	4	5	5	5
Las Vegas	5	(9)	4	2	6
Rockies	4	1	3	8	5
Yosemite National Park	3	*	5	5	3
Miami	3	7	1	1	3

Note: Circled numbers represent those referred to in the main text

* Less than 0.5%

TABLE 52

PRODUCT SEGMENTS - MEDIA READERSHIP

	<u>Total</u>	<u>PRODUCT SEGMENT</u>			
		<u>Developed</u>	<u>Culture</u>	<u>Nature & Culture</u>	<u>Sports & Entertainment</u>
		<u>Resort</u>			
Total respondents (100%)	1503	322	435	295	445
	%	%	%	%	%
<u>Top 5 daily newspapers</u>					
Sydney Morning Herald	21	18	19	(27)	22
The Age	16	14	16	19	16
The Sun	15	(21)	12	9	18
Daily Telegraph	13	(18)	10	7	15
The Herald	9	11	9	7	10
Western Australian	9	9	9	9	11
<u>Top 5 Sunday papers</u>					
Sun-Herald	22	24	22	19	23
Sunday Telegraph	18	(23)	16	12	(21)
Sunday Mail	12	12	15	12	12
Weekend Australian	9	5	9	(15)	9
Sunday Times	9	9	9	7	12
<u>Top 5 weekly magazines</u>					
New Idea	26	(33)	(34)	16	21
TV Week	22	35	19	10	24
Woman's Day	18	(26)	(24)	11	13
Bulletin/Newsweek	12	9	10	14	13
Time	10	10	8	(14)	8
<u>Top 5 monthly magazines</u>					
Australian Women's Week	26	(35)	(30)	16	22
Reader's Digest	15	17	(19)	10	14
House and Gardens	12	13	13	10	11
Better Homes and Gardens	11	14	11	12	10
Family Circle	9	9	13	8	6

Note: Circled numbers represent those referred to in the main text

TABLE 53

PRODUCT SEGMENTS BY TRAVEL PHILOSOPHY
AND BENEFIT SEGMENTS

	<u>Total</u>	<u>PRODUCT SEGMENT</u>			
		<u>Developed</u> <u>Resort</u>	<u>Culture</u>	<u>Nature & Culture</u>	<u>Sports & Entertainment</u>
Total respondents (100%)	1503 %	322 %	435 %	295 %	445 %
<u>Travel philosophy</u> <u>segment</u>					
Budget Independent	35	24	28	(67)	27
Touring Package	33	(37)	(45)	18	28
Guarded	33	(38)	27	15	(45)
<u>Benefit segment</u>					
Action Getaway	33	34	9	33	(56)
Social Safety	33	35	(49)	17	25
Experiential	34	31	(42)	(50)	19

Note: Circled numbers represent those referred to in the main text

8. PERCEPTIONS OF CANADA/U.S. VS. IMPORTANCE RATINGS

8.1 Perception ratings

In order to obtain very specific information regarding the images of the vacation products available in Canada and the U.S., respondents were asked to compare the two countries against other overseas destinations on a series of attributes using a five point scale as follows:

	<u>Weight</u>
A lot better	+2
A little better	+1
The same	0
Not quite as good	-1
Not nearly as good	-2

The weights were added at the data processing stage as respondents answered based only on the verbal scale.

Canada was rated on a total of 31 attributes while the U.S. was rated on a total of 33 attributes. Although basically similar, there were several differences in the lists of attributes selected to rate each country.

Due to concerns about potential fatigue, respondents were randomly asked to rate either Canada or the U.S. but not both i.e. approximately half the sample rated each destination.

The mean ratings for Canada and the U.S. were mostly positive, indicating a better than average rating on almost every attribute. The following observations can be made:

Canada - The highest rated attributes were all related to Canada's outdoors. Attributes relating to Canada's natural environment included outstanding scenery (1.28), national parks and forests (1.24), and seeing wildlife in a natural setting (0.90). Activities relating to the outdoors included snow skiing (1.21), hiking and climbing (1.05), hunting (0.98), and fishing (0.97). Canada was also seen as a clean (0.86) and safe (0.81) destination to visit.

The main negative about Canada was perceived to be its beaches for swimming and sunning (-0.54). Its water sports (-0.07) were also rated comparatively poorly. Cost was a relatively weak area as well based on the ratings given to inexpensive travel to the country (0.01), inexpensive restaurants (0.09), budget accommodation (0.12), and value for vacation money (0.19). The other relatively weak area was historical sites and buildings (0.06) and museums and art galleries (0.12).

U.S.

- The U.S. was strongly rated for its entertainment opportunities including amusement or theme parks (1.29), casinos and gambling (1.02), nightlife and entertainment (0.95), variety of things to see and do (0.69), and live theatre and concerts (0.69). In a related vein it received high ratings for fast food restaurants (1.10), first class hotels (0.98), and high quality restaurants (0.69). National parks and forests (0.78), mountainous areas (0.62), and outstanding scenery (0.56) were also well regarded features of the U.S.

The main weakness was personal safety (-0.21), although this was not as negative as has been seen in other countries in which this survey has been conducted. Historical sites and buildings (+0.14) were another comparatively poor area. As with Canada, perceived cost was also a potential weakness based on the ratings given to value for vacation money (0.16) and budget accommodation (0.18).

(Reference: Tables 54 and 55)

TABLE 54

PERCEPTIONS OF CANADA ON VARIOUS
PRODUCT ATTRIBUTES AS COMPARED WITH
OTHER OVERSEAS DESTINATIONS*

	<u>Total</u>
Total respondents rating Canada	744
Outstanding scenery	+1.28
National parks and forests	+1.24
Snow skiing	+1.21
Outdoor activities such as hiking, climbing	+1.05
Hunting	+0.98
Fishing	+0.97
Seeing wildlife in a natural setting	+0.90
Unique cultural groups (Eskimo, Amish, etc.)	+0.88
Hygiene and cleanliness	+0.86
Personal safety	+0.81
Public transportation	+0.61
Interesting and friendly local people	+0.58
Variety of things to see and do	+0.53
First class hotels	+0.53
Spectator sporting events	+0.43
High quality restaurants	+0.35
Live theatre and concerts	+0.29
Nightlife and entertainment	+0.26

* Mean scores based on "a lot better" = +2
 "a little better" = +1
 "the same" = 0
 "not quite as good" = -1
 "not nearly as good" = -2

TABLE 54 (cont'd)

PERCEPTIONS OF CANADA ON VARIOUS
PRODUCT ATTRIBUTES AS COMPARED WITH
OTHER OVERSEAS DESTINATIONS*

	<u>Total</u>
Total respondents rating Canada	744
Kinds of things like to do on vacation	+0.26
Shopping	+0.25
Amusement or theme parks	+0.22
Value for vacation money	+0.19
Local festivals	+0.14
Inexpensive travel <u>in</u> destination country	+0.12
Budget accommodation	+0.12
Museums and art galleries	+0.12
Inexpensive restaurants	+0.09
Historical sites and buildings	+0.06
Inexpensive travel <u>to</u> destination country	+0.01
Water sports	-0.07
Beaches for swimming and sunning	-0.54

* Mean scores based on "a lot better" = +2
 "a little better" = +1
 "the same" = 0
 "not quite as good" = -1
 "not nearly as good" = -2

TABLE 55

PERCEPTIONS OF THE U.S. ON VARIOUS
PRODUCT ATTRIBUTES AS COMPARED WITH
OTHER OVERSEAS DESTINATIONS*

	<u>Total</u>
Total respondents rating the U.S.	759
Amusement or theme parks	+1.29
Fast food restaurants	+1.10
Casinos and gambling	+1.02
First class hotels	+0.98
Nightlife and entertainment	+0.95
National parks and forests	+0.78
Public transportation	+0.74
Variety of things to see and do	+0.69
Live theatre and concerts	+0.69
High quality restaurants	+0.69
Resort areas	+0.66
Availability of package vacations	+0.63
Mountainous areas	+0.62
Shopping	+0.58
Outstanding scenery	+0.56
Unique cultural groups (Eskimo, Amish, etc.)	+0.44
Opportunities to increase knowledge	+0.44
Opportunity to be daring and adventuresome	+0.41

* Mean scores based on "a lot better" = +2
 "a little better" = +1
 "the same" = 0
 "not quite as good" = -1
 "not nearly as good" = -2

TABLE 55 (cont'd)

PERCEPTIONS OF THE U.S. ON VARIOUS
PRODUCT ATTRIBUTES AS COMPARED WITH
OTHER OVERSEAS DESTINATIONS*

	<u>Total</u>
Total respondents rating the U.S.	759
Outdoor activities such as climbing, hiking	+0.39
Water sports	+0.35
Hunting	+0.34
Interesting and friendly local people	+0.31
Inexpensive restaurants	+0.31
Fishing	+0.29
Museums and art galleries	+0.28
Kinds of things like to do on vacation	+0.28
Beaches for swimming and sunning	+0.24
Snow skiing	+0.23
Opportunity to escape from the ordinary	+0.20
Budget accommodation	+0.18
Value for vacation money	+0.16
Historical sites and buildings	+0.14
Personal safety	-0.21

* Mean scores based on "a lot better" = +2
"a little better" = +1
"the same" = 0
"not quite as good" = -1
"not nearly as good" = -2

8.2 Perception vs. importance - total sample

While perception ratings are useful in themselves, additional insight can be obtained by comparing these ratings against their importance to respondents. For example, a particularly high or low perception rating would become irrelevant if it was determined that the attribute was of low importance.

With this in mind, perception ratings were plotted against importance ratings in order to give a visual summary of their relationship. (It will be recalled that the importance ratings were used to create the product segments.) The top areas of the plots are those of most relevance as they correspond to the areas of greatest rated importance.

The area in the top right of each map represents attributes of high importance and high perception, and thus identifies major strengths. On the other hand, the area in the top left of each map represents high importance and low perception i.e. major weaknesses.

Vertical and horizontal lines have been drawn on each map to divide it into quadrants. It should be noted that the locations of these lines are basically arbitrary, but have been selected to roughly split the attributes into equal halves. For example, a roughly equal number of attributes would appear above the horizontal line as would appear below it.

It should also be noted that the maps for Canada include 27 attributes while the maps for the U.S. include 29 attributes for which both perception and importance ratings are available. Perceptions ratings are available for a further two attributes ("kinds of things I like to do on vacation" and "variety of things to see and do"), but since corresponding importance ratings were not obtained, these could not be included in the map.

The following observations can be made:

Canada - Major strengths included a number of outdoor attributes (e.g. outstanding scenery, national parks and forests, and seeing wildlife or birds), as well as several positive social features (e.g. personal safety, hygiene and cleanliness, public transportation, and interesting and friendly local people.

The weaknesses included inexpensive travel in destination, inexpensive restaurants, budget accommodation, and good shopping.

(Reference: Figure 11)

U.S. - Major strengths included outstanding scenery, public transportation, and national parks and forests. Other strengths were good shopping and mountainous areas.

Some borderline weaknesses were interesting and friendly local people, opportunities to escape from the ordinary, mountainous areas, inexpensive restaurants, and budget accommodation. The only strong weakness was personal safety.

(Reference: Figure 12)

FIGURE 11

ATTRIBUTE IMPORTANCE VS. PERCEPTION - CANADA

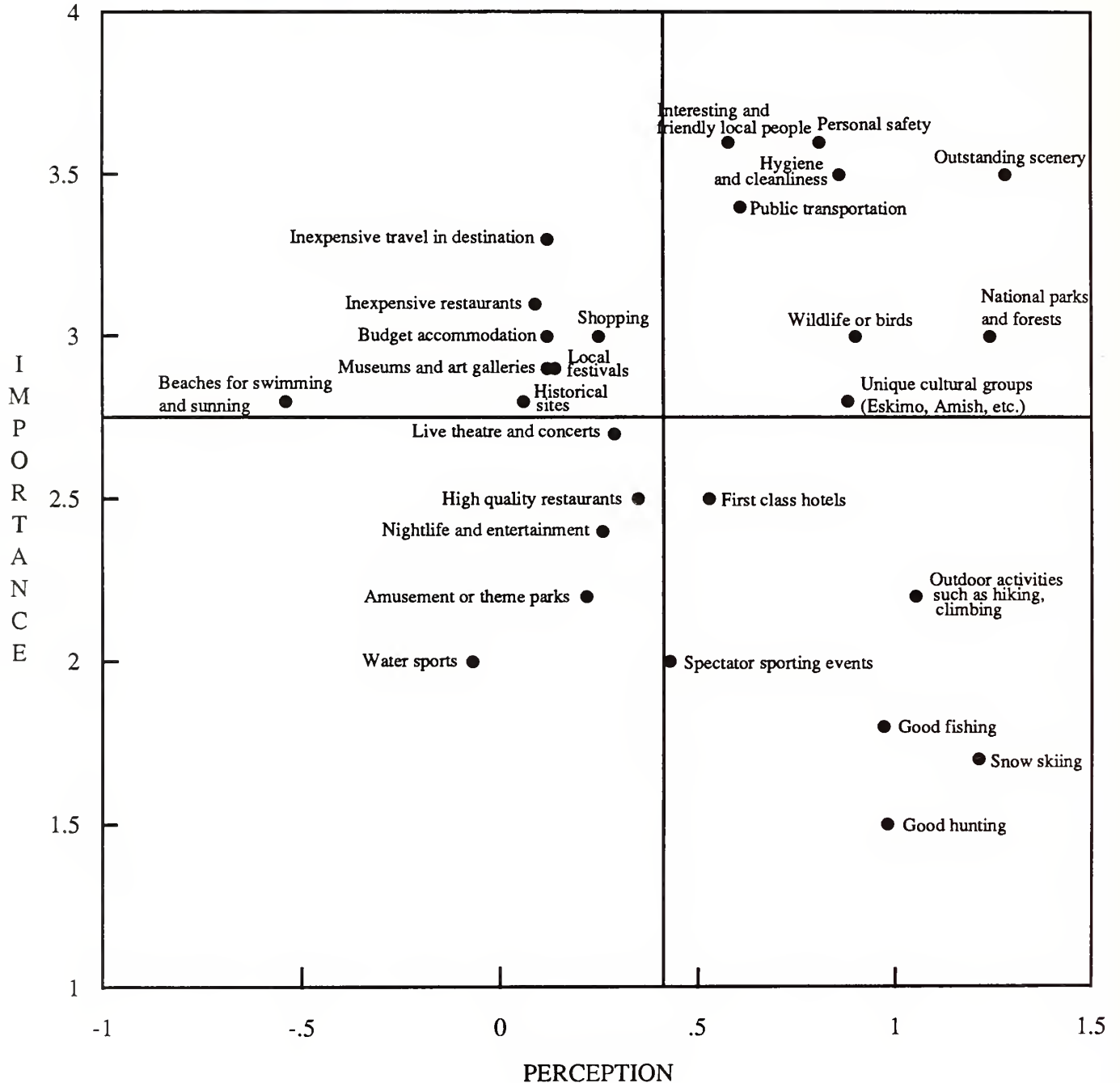
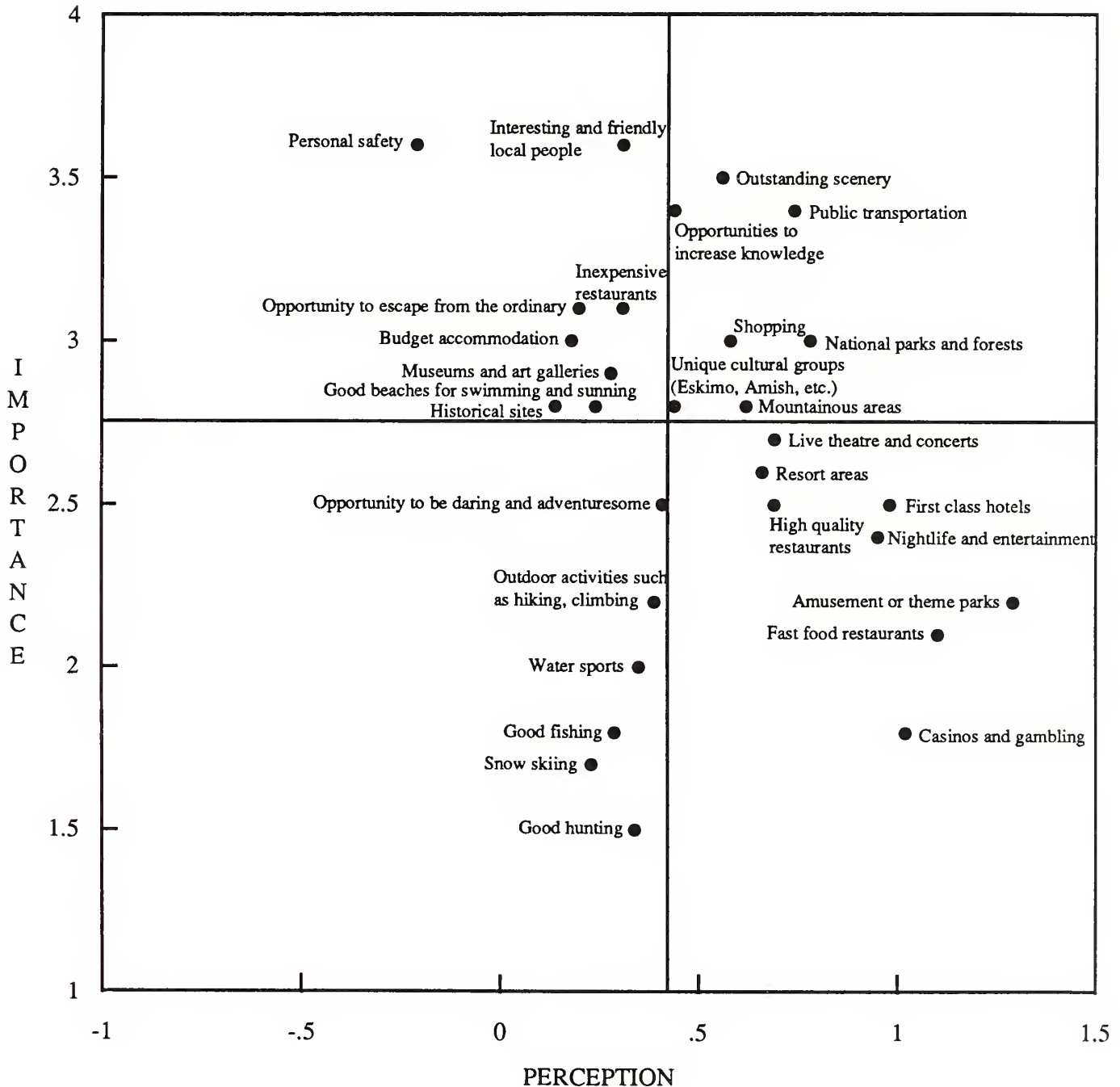


FIGURE 12

ATTRIBUTE IMPORTANCE VS. PERCEPTION - U.S.



8.3 Most appealing feature of Canada as a vacation destination

Respondents who had ever traveled to Canada were asked what one thing about it would make them recommend it as a vacation destination. This was an open ended question and respondents' answers were grouped into several different categories. This question was not asked regarding the U.S.

Over half the respondents (56%) who had traveled to Canada mentioned the beautiful scenery as its most appealing feature. This was by far the most dominant mention, the next most frequent mentions being friendly local people (11%) and mountains (9%).

(Reference: Table 56)

TABLE 56

MOST APPEALING FEATURE OF CANADA
AS A VACATION DESTINATION

	<u>Total</u>
Total respondents been to Canada (100%)	219
	%
Beautiful scenery	56
Friendly local people	11
Mountains	9
Niagara Falls	5
No language barrier	4
Places worth visiting	4
A big country	3
National parks/forests	3
Other	14

APPENDIX I

BASIC DATA

Newspaper and magazine readership

Demographics

DAILY NEWSPAPERS READ OR LOOKED
INTO REGULARLY
 (At least 3 of every 6 issues)*

	<u>Total</u>
Total respondents (100%)	1503
	%
Sydney Morning Herald	21
The Age	16
The Sun	15
Daily Telegraph	13
The Herald	9
Western Australian	9
Courier Mail	8
The Advertiser	8
Other	21
Do not read newspapers	17

* Based on those with 75 or more mentions

SUNDAY PAPERS READ OR LOOKED
INTO REGULARLY
 (At least 2 of every 4 issues)*

	<u>Total</u>
Total respondents (100%)	1503
	%
Sun-Herald	22
Sunday Telegraph	18
Sunday Mail	12
Weekend Australian	9
Sunday Times	9
Sunday Sun	5
Sunday Press	5
Others	5
Do not read Sunday papers	33

* Based on those with 75 or more mentions

WEEKLY PERIODICALS AND MAGAZINES
READ OR LOOKED INTO REGULARLY
 (At least 2 of every 4 issues)*

	<u>Total</u>
Total respondents (100%)	1503
	%
New Idea	26
TV Week	22
Woman's Day	18
Bulletin/Newsweek	12
Time	10
Australasian Post	5
Others	6
Do not read weekly periodicals and magazines	41

* Based on those with 75 or more mentions

MONTHLY MAGAZINES READ OR LOOKED
INTO REGULARLY
 (At least 2 of every 4 issues)*

	<u>Total</u>
Total respondents (100%)	1503
	%
Australian Women's Weekly	26
Reader's Digest	15
House and Gardens	12
Better Homes and Gardens	11
Family Circle	9
Cleo	7
Others	14
Do not read monthly magazines	46

* Based on those with 75 or more mentions

SAMPLE DEMOGRAPHICS

	<u>Total</u>
Total respondents (100%)	1503
	%
<u>Sex</u>	
Male	49
Female	51
<u>Age</u>	
18 - 24 years	13
25 - 34 years	23
35 - 44 years	22
45 - 54 years	17
55 - 64 years	15
65 years or over	11
<u>Marital status</u>	
Single	22
Married	66
Living together	2
Divorced/separated/widowed	10
<u>Working status</u>	
Full time	(66)
Owner	4
Manager/executive	7
Professional/technical	20
Clerical/sales	18
Skilled worker	12
Unskilled worker	5
Not at all	(34)
Retired	13
Student	5
Homemaker	16
<u>Education</u>	
Primary	5
Secondary/high school	46
Technical/commercial	27
University	23

SAMPLE DEMOGRAPHICS (cont'd)

	<u>Total</u>
Total respondents (100%)	1503
	%
<u>Whether chief wage earner</u>	
Yes	48
No	52
<u>Household income in Australian dollars</u> <u>(1987/88 financial year)</u>	
Under \$20,000	16
\$20,000 - 29,999	16
\$30,000 - 39,999	16
\$40,000 - 49,999	13
\$50,000+	24
Refused	15
<u>Life cycle</u>	
Living alone	10
Living with one adult	30
Single with children	7
Couple with children	33
Other	21
<u>Living arrangement</u>	
Live alone	12
Living with children	41
Living without children	47
<u>Number of household members 18 years or over</u>	
1	11
2	55
3	21
4	10
5	3
6 or more	1
Mean	<u>2.4</u>

SAMPLE DEMOGRAPHICS (cont'd)

	<u>Total</u>
Total respondents (100%)	1503
	%
<u>Number of household members under 18 years</u>	
None	59
1	17
2	15
3 or more	8
Mean	<u>0.7</u>
<u>Whether members of household are related</u>	
Yes	80
No	10
Single member house	10
<u>Whether self-employed</u>	
Yes	18
No	82
<u>Friends or relatives presently live in ...</u>	
Canada - yes	29
- no	71
U.S. - yes	38
- no	62
<u>Fluency in French</u>	
Read	20
Write	13
Speak	20
None	75

APPENDIX II
QUESTIONNAIRE

INTERNATIONAL TRAVEL STUDY - MA2326

Country Code 1- 1

Respondent ID:

2	3	4	5	

6-9 BLANK

- 1a) Now I'd like you to think about the vacation or pleasure trips of four nights or longer that you have taken in the past three years. Please include all the vacation or pleasure trips you have taken, **not** just those to places outside Australia. Remember to include only those trips that were either entirely or in part for pleasure.

In the past **three** years since September 1985, about how many vacation or pleasure trips, in total, have you taken that were **four** nights or **longer**? (RECORD NUMBER)

10	11

trips

IF

0	0
---	---

SKIP TO INSTRUCTION
AFTER Q.10b

- 1b) On how many of these trips did you travel to your destination by plane?

12	13

trips

IF

0	0
---	---

SKIP TO INSTRUCTION
AFTER Q.10b

- 1c) And for how many of these trips by plane was your furthest destination from home...(READ LIST AND RECORD NUMBER FOR EACH - NUMBERS MUST ADD TO NUMBER OF TRIPS IN Q.1b)

14-17 BLANK

Somewhere in Australia

18	19

trips (B)

Somewhere outside Australia

20	21

trips (A)

IF BOX A =

0	0
---	---

SKIP TO INSTRUCTION AFTER Q.10b

IF BOX A =

0	1
---	---

ASK Q.2a to 2d ABOUT THIS TRIP OUTSIDE AUSTRALIA.

IF BOX A =

0	2
---	---

OR MORE, ASK Q.2a to 2d ABOUT MOST RECENT AND SECOND MOST RECENT TRIP OUTSIDE AUSTRALIA.

- 2a) Thinking about your (most recent/second most recent) trip of four nights or longer to somewhere outside of Australia, which of these places did you visit on that trip? (HAND CARD "A" - CIRCLE AS MANY AS APPLY)

	Most recent	Second most recent
Mainland U.S.A.-----	22- 1	26- 1
Canada-----	2	2
Mexico-----	3	3
Central/South America-----	4	4
The West Indies/Caribbean--	5	5
Africa-----	6	6
Near/Middle East-----	7	7
Asia-----	8	8
Hawaii/Guam/Samoa-----	9	9
Other South Pacific-----	10	10
New Zealand-----	11	11
Europe/United Kingdom-----	12	12
Other (SPECIFY)-----	23- _____	27- _____

- 2b) Which **one** of the trip descriptions on this card best describes what type of trip this was? (HAND CARD "B" - CIRCLE **ONE** ONLY)

A visit to friends and relatives-----	24- 1	28- 1
A touring trip-----	2	2
A city trip-----	3	3
An outdoor trip-----	4	4
A resort trip-----	5	5
A trip to an exhibition, special event, amusement or theme park-----	6	6
A cruise-----	7	7
A trip that combined business and pleasure-----	8	8

25-BLANK

29-BLANK

(IF MAINLAND U.S.A. CIRCLED IN Q.2a ASK Q.2c.
IF CANADA CIRCLED IN Q.2a ASK Q.2d
ALL OTHERS SKIP TO INSTRUCTION AFTER QU.2d)

2c) While you were in the United States, by which of the following did you travel?
(HAND CARD "C" - CIRCLE AS MANY AS APPLY)

	<u>Most recent</u>	<u>Second most recent</u>
Plane-----	30- 1	33- 1
Train-----	2	2
Bus between cities-----	3	3
Public Transportation within cities (e.g. Bus, subway, tram, etc. excluding taxis)-----	4	4
Boat-----	5	5
Rented Car-----	6	6
Private Car-----	7	7
Camper or Caravan-----	8	8

2d) While you were in Canada, by which of the following did you travel? (HANDCARD "C" - CIRCLE AS MANY AS APPLY)

	<u>31-BLANK Most recent</u>	<u>34-BLANK Second most recent</u>
Plane-----	32- 1	35- 1
Train-----	2	2
Bus between cities-----	3	3
Public Transportation within cities (e.g. Bus, subway, tram, etc. excluding taxis)-----	4	4
Boat-----	5	5
Rented Car-----	6	6
Private Car-----	7	7
Camper or Caravan-----	8	8

IF BOX A IN Q.1c =

0	1
---	---

 CONTINUE.

IF BOX A IN Q.1c =

0	2
---	---

 OR MORE, ASK Q.3a TO Q.10 ABOUT SECOND MOST RECENT TRIP.

SAY : Now just thinking about your second most recent trip...

3a) On that trip to (DESTINATION IN Q.2a), how many nights, in total, were you away from home? (RECORD NUMBER)

36	37	38

3b) And when did you take that trip? Please tell me the month and the year you started that trip.

(month)

3	9
---	---

40

1	9	8	
(year) 41			

42 2

4a) Whom did you travel with on this trip? (CIRCLE AS MANY AS APPLY)

Travelled alone----- 43 - 1 → SKIP TO Q.5a
 Wife/husband/girlfriend/boyfriend----- 2
 Child(ren)----- 3
 Father/mother----- 4
 Other relatives----- 5
 Friends----- 6
 Organised group/club/etc----- 7
 Business associates/colleagues----- 8
 Other (Specify)_____

4b) Including yourself, how many people were there in your individual travel party or group? (CIRCLE ONE ONLY)

44 - 1 2 3 4 5 6 7 8 9 or more

4c) And how many of these were under 18 years of age? (CIRCLE ONE ONLY)

45 - 0 1 2 3 4 5 6 7 8 9 or more

5a) How long before your trip did you definitely decide to go to (DESTINATION)?
 (RECORD NUMBER IN APPROPRIATE BOX)

46	47

 weeks OR

48	49

 months OR

50	51

 years

5b) And how long before your trip did you actually start booking it?

52	53

 weeks OR

54	55

 months OR

56	57

 years

6a) What different sources of information, if any, did you use when you were planning the trip? (CIRCLE AS MANY AS APPLY)

	ANY USED Q.6a	MOST IMPORTANT Q.6b
Talked to Travel Agent-----	58 - 1	60 - 1
Picked up brochures/pamphlets-----	2	2
Talked to friends/family members-----	3	3
Airline-----	4	4
Tour operator/company-----	5	5
Read articles/features in newspapers/ magazines-----	6	6
Books/went to library-----	7	7
Automobile Association-----	8	8
Government tourism office/Board-----	9	9
Embassy/Consulate-----	10	10
Clubs/Associations-----	11	11
Advertisements-----	12	12
Other (SPECIFY)_____	59-	61 -
None-----	11	11

6b) And which one of these sources would you say was the most important? (CIRCLE ONE)

7a) Was your plane ticket part of a package that included accommodation?

Yes----- 62 - 1

No----- 2 → SKIP TO Q.7c

7b) Where did you book your flight and accommodation? (CIRCLE ONE ONLY)

Travel Agent----- 63 - 1

Directly with Airline----- 2

Other (SPECIFY) _____

→ SKIP TO Q.8a

7c) Where did you book your flight to and from your destination for this holiday?
(CIRCLE ONE ONLY)

Travel Agent----- 64 - 1

Directly with airline----- 2

Other (SPECIFY) _____

7d) And where did you book your accommodation for this holiday? (CIRCLE AS MANY AS
APPLY)

Travel Agent----- 65 - 1

Directly with Hotel, etc.----- 2

Stayed with friends/relatives-- 3

Did not book in advance----- 4

Other (SPECIFY) _____

8a) And was your trip a guided tour, that is, did you travel with a group on a planned
itinerary?

Yes----- 66 - 1

No----- 2 → SKIP TO Q.9

8b) And where did you book your guided tour?

Travel Agent----- 67 - 1

Tour company/Holiday company--- 2

Through an airline----- 3

Other (SPECIFY) _____

9. I would like you to tell me which of the following activities you actually took part in during your holiday? (READ EVERY STATEMENT STARTING WITH * CIRCLE AS MANY AS APPLY

Attending concerts/live theatre-----	68- 1
Attending local festivals/fairs/other special events-----	2
Attending sporting events-----	3
Climbing, hiking, etc.-----	4
Getting to know the local inhabitants---	5
✓ Dining out in restaurants-----	6
Fishing-----	7
Going on short guided excursions/tours--	8
Golfing or playing tennis-----	9
Horse-riding-----	0
Hunting-----	11
Observing wildlife/bird watching-----	12
Sampling local foods-----	69- 1
Shopping-----	2
Sightseeing in cities-----	3
Snow skiing (downhill or cross country)-	4
Sunbathing or other beach activities----	5
Swimming-----	6
Taking pictures or filming-----	7
Sightseeing in the countryside-----	8
Visiting wilderness areas-----	9
Visiting amusement or theme parks-----	0
Visiting casinos/gambling-----	11
Visiting friends or relatives-----	12
Visiting galleries/museums-----	70- 1
Visiting mountainous areas-----	2
Visiting national parks or forests-----	3
Visiting night clubs or other places of entertainment (discos, dancing, etc)--	4
Visiting the seaside-----	5
Visiting places of historical interest--	6
Visiting sites commemorating important people-----	7
Visiting places of archeological interest-----	8
Visiting places of importance in military history-----	9
Visiting scenic landmarks-----	0
Water sports (e.g. surfing, water skiing, sailing, canoeing, scuba diving-----	11
Visiting health spas-----	12
Taking a day cruise-----	71- 1
Taking a cruise of one or more nights---	2

- 10a) Overall, how satisfied were you with your holiday in DESTINATION? Would you say you were ... (READ LIST - CIRCLE ONE)

Very satisfied-----	72 - 1
Somewhat satisfied-----	2
not very satisfied-----	3
OR not at all satisfied-----	4

- 10b) And in the next 5 years, how likely is it that you will take another holiday to (DESTINATION)? Is it ... (READ LIST - CIRCLE ONE)

very likely-----	73- 1
somewhat likely-----	2
not very likely-----	3
OR not at all likely-----	4

(TURN PAGE AND READ Q.11 AND THEN HAND QUESTIONNAIRE AND PEN/PENCIL TO RESPONDENT)

- 11) Here are some statements describing how people might feel about vacation pleasure travel. For each statement listed, please put an "X" in one box to show how much you agree or disagree that the statement describes how you feel about overseas vacation travel.

	Strongly agree	Agree somewhat	Disagree somewhat	Strongly disagree
I like to have all my travel arrangements made before I start out on vacation --- 6	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I take short pleasure trips whenever I have the opportunity ----- 7	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Making arrangements for major trips can be such a bother that I end up not travelling ----- 8	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I usually choose vacation places where I have been before ----- 9	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
For me, money spent on travel is well spent ----- 10	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
In any one year I would rather take a number of short vacation trips instead of one long vacation trip ----- 11	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I would just as soon spend my money on things other than vacation travel ---- 12	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I enjoy making my own arrangements for vacation trips ----- 13	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Once I get to my destination, I like to stay put ----- 14	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I think it's worth paying more to get luxuries and extras on a vacation trip 15	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I prefer to go on guided tours when vacationing overseas----- 16	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I don't have to travel to enjoy a vacation ----- 17	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
✓ I don't have to spend a lot of money to enjoy a vacation ----- 18	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I like to go to a different place on each new vacation trip ----- 19	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I often choose vacation places that I have heard about from friends who have been there ----- 20	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
It is important that the people I encounter on a vacation trip speak my language ----- 21	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I usually travel on reduced air fares -- 22	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I like to make my arrangements as I go along on a vacation ----- 23	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I usually use a travel agent to help me decide where to go on vacation ----- 24	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I prefer to leave the organising to the people I'm travelling with ---- 25	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I usually buy vacation packages which include both accommodation and transportation ----- 26	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
When visiting another country, I like to travel from place to place rather than spending my whole vacation in one area 27	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Inexpensive travel to the destination country is important to me ----- 28	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
I usually travel on all-inclusive package vacations ----- 29	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Getting value for my vacation money is very important to me ----- 30	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4

31- ①

PLEASE HAND BACK TO INTERVIEWER

12a) Now I'd like you to think about places **outside** Australia that you would like to travel to for a vacation.

What are the names of **five** places that you would like to visit on an overseas vacation trip? (RECORD BELOW IN ORDER MENTIONED - PROBE UNTIL 5 PLACES GIVEN)

Q.12b
Most like
to visit

<div style="border: 1px solid black; display: inline-block; width: 20px; height: 20px; vertical-align: middle;"></div> <div style="border: 1px solid black; display: inline-block; width: 20px; height: 20px; vertical-align: middle;"></div> <div style="border: 1px solid black; display: inline-block; width: 20px; height: 20px; vertical-align: middle;"></div>	1. _____	47- 1
32 33 34		
<div style="border: 1px solid black; display: inline-block; width: 20px; height: 20px; vertical-align: middle;"></div> <div style="border: 1px solid black; display: inline-block; width: 20px; height: 20px; vertical-align: middle;"></div> <div style="border: 1px solid black; display: inline-block; width: 20px; height: 20px; vertical-align: middle;"></div>	2. _____	2
35 36 37		
<div style="border: 1px solid black; display: inline-block; width: 20px; height: 20px; vertical-align: middle;"></div> <div style="border: 1px solid black; display: inline-block; width: 20px; height: 20px; vertical-align: middle;"></div> <div style="border: 1px solid black; display: inline-block; width: 20px; height: 20px; vertical-align: middle;"></div>	3. _____	3
38 39 40		
<div style="border: 1px solid black; display: inline-block; width: 20px; height: 20px; vertical-align: middle;"></div> <div style="border: 1px solid black; display: inline-block; width: 20px; height: 20px; vertical-align: middle;"></div> <div style="border: 1px solid black; display: inline-block; width: 20px; height: 20px; vertical-align: middle;"></div>	4. _____	4
41 42 43		
<div style="border: 1px solid black; display: inline-block; width: 20px; height: 20px; vertical-align: middle;"></div> <div style="border: 1px solid black; display: inline-block; width: 20px; height: 20px; vertical-align: middle;"></div> <div style="border: 1px solid black; display: inline-block; width: 20px; height: 20px; vertical-align: middle;"></div>	5. _____	5
44 45 46		

12b) Which **one** of these places would you most like to visit in the next two years? (CIRCLE ONE ONLY) ↑

12c) And how likely is it that you will visit ...(PLACE FROM Q.12b) in the next 12 months? Would you say that you(READ LIST - CIRCLE ONE)

- | | |
|--|-------|
| will definitely visit ----- | 48- 1 |
| are very likely to visit ----- | 2 |
| are somewhat likely to visit ----- | 3 |
| might or might not visit ----- | 4 |
| OR are not likely to visit ----- | 5 |

13) I would like to know how important different things are to you when deciding to take an overseas vacation trip.

(TURN PAGE AND READ Q.13 AND HAND QUESTIONNAIRE AND PEN/PENCIL TO RESPONDENT)

(WHEN RESPONDENT HAS COMPLETED Q.13, TURN PAGE AND READ Q.14. HAND QUESTIONNAIRE BACK TO RESPONDENT).

- 13) Please imagine that you are thinking of taking an overseas vacation trip. For each statement on this page, "X" one box to show how important that reason is to you when considering such a trip.

	Very important	Somewhat important	Not very important	Not at all important
Getting away from the demands of home ----- 49-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
✓ Reliving past good times ----- 50-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Experiencing new and different lifestyles ----- 51-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Trying new foods ----- 52-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Travelling through places that are important in history ----- 53-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Being free to act the way I feel ----- 54-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Finding thrills and excitement - ----- 55-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Experiencing a simpler lifestyle ----- 56-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Being together as a family ----- 57-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Meeting people with similar interests ----- 58-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Seeing and experiencing a foreign destination ----- 59-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Going places my friends haven't been ----- 60-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Talking about the trip after I return home ----- 61-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Participating in sports ----- 62-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Watching sports events ----- 63-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Travelling to places where I feel safe and secure ----- 64-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Having fun, being entertained -- 65-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Seeing as much as possible in the time available ----- 66-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Rediscovering myself ----- 67-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Visiting friends and relatives-- 68-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Visiting places my family came from ----- 69-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Being physically active ----- 70-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Getting a change from a busy job ----- 71-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Being daring and adventuresome - ----- 72-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Doing nothing at all ----- 73-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Learning new things, increasing my knowledge ----- 74-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Indulging in luxury ----- 75-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Roughing it ----- 76-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Escaping from the ordinary ----- 77-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
Feeling at home away from home--- 78-	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4
79- 0				
80- 3				

1-1
RESP 2-5
6-9 BLANK

- 14) When choosing a destination for an overseas vacation trip, different things are important to different people. Listed below are a number of items. For each item, please "X" one box to show how important that item is to you in an overseas vacation destination.

6-9 BLANK

		<u>Very</u> <u>important</u>	<u>Somewhat</u> <u>important</u>	<u>Not very</u> <u>important</u>	<u>Not at all</u> <u>important</u>
High quality restaurants-----	10-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Budget accommodation -----	11-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Seaside -----	12-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Golf and tennis -----	13-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Big modern cities -----	14-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Historic old cities -----	15-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Nightlife and entertainment					
(Bars, clubs, dancing) -----	16-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Outstanding scenery -----	17-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Shopping -----	18-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Reliable weather -----	19-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Standards of hygiene and cleanliness ----	20-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Mountainous areas -----	21-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Local cuisine -----	22-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Personal safety, even when					
travelling alone -----	23-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Snow skiing (downhill/cross-country) ----	24-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Interesting small towns and villages ----	25-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Beaches for swimming and sunning -----	26-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
✓ Casinos and gambling -----	27-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Campgrounds and trailer parks -----	28-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Local festivals, such as					
folklore and country fairs-----	29-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Amusement or theme parks -----	30-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Museums and art galleries -----	31-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Warm, sunny climate -----	32-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Wilderness and undisturbed nature -----	33-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Interesting and friendly local people --	34-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Wide open spaces to get away from crowds-	35-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Local crafts and handiwork -----	36-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Outdoor activities such as					
hiking, climbing -----	37-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Inexpensive restaurants -----	38-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Public transportation such as airlines,					
railways, local transit systems -----	39-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Live theatre and concerts -----	40-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>

	Very important	Somewhat important	Not very important	Not at all important
Resort areas ----- 41-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Unique or different cultural groups such as Eskimo and Indian ----- 42-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
National parks and forests ----- 43-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Inexpensive travel in the destination country ----- 44-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Variety of short guided excursions/tours- 45-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Exotic atmosphere ----- 46-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Warm welcome for tourist ----- 47-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Lakes and rivers ----- 48-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Culture different from my own----- 49-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Fishing ----- 50-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Hunting ----- 51-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
First class hotels ----- 52-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Spectator sporting events ----- 53-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Historical, archeological or military sites & buildings ----- 54-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Chance to see wildlife and birds I don't usually see----- 55-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Opportunities to increase one's knowledge 56-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Manageable size so I can see everything I want to see ----- 57-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Water sports such as surfing, water skiing, sailing, scuba diving ----- 58-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Fast food restaurants ----- 59-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Environmental quality of air, water and soil ----- 60-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>
Cruises of one or more nights----- 61-	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>

62- BLANK

63- ①

64-78- BLANK

79- ②








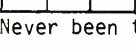

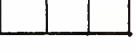


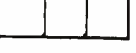
80- ④

PLEASE HAND BACK TO
INTERVIEWER

- 15a) Now I'd like you to think about places in the United States that people might go to on a vacation. What are the names of five places in the United States where people might go on a vacation? (RECORD BELOW UNDER Q.15a IN ORDER MENTIONED) PROBE: What other places in the United States?
- 15b) Looking at this map of the United States, please tell me the names of three other places in the United States that people might go on a vacation? (HAND MAP - RECORD BELOW UNDER Q.15b IN ORDER MENTIONED) PROBE: What other places?
- 15c) Which places in the United States, if any, have you ever been to? PROBE: Any other places? (RECORD UNDER Q.15c - CIRCLE AS MANY AS APPLY. IF RESPONDENT MENTIONS PLACES NOT LISTED UNDER Q.15a OR Q.15b, RECORD BELOW UNDER "OTHER". IF NOT BEEN TO THE UNITED STATES, CIRCLE 11 AND SKIP TO Q.15e)
- 15d) Which places, if any, have you been to in the past three years, since September, 1985? (RECORD UNDER Q.15d - CIRCLE ALL RESPONSES)
- 15e) You have named a number of different places in the United States. (READ ALL PLACES MENTIONED - Q.15a, Q.15b AND OTHER) Which one of these places would you be most interested in visting or re-visiting (RECORD UNDER Q.15e - MOST)

And which one would be your second choice? (RECORD UNDER Q.15e - 2nd)
And which one would be your third choice? (RECORD UNDER Q.15e - 3rd - TAKE BACK)

6-9 BLANK

	Q.15a	Q.15c	Q.15d Ever been to	Q.15d Been in past 3 yrs	Q.15e Most	Q.15e 2nd	Q.15e 3rd
10-12	1. 	49- 1	50- 1	52- 1	54- 1	56- 1	
13-15	2. 	2	2	2	2	2	
16-18	3. 	3	3	3	3	3	
19-21	4. 	4	4	4	4	4	
22-24	5. 	5	5	5	5	5	
	<u>Q.15b</u>						
25-27	6. 	6	6	6	6	3	
28-30	7. 	7	7	7	7	7	
31-33	8. 	8	8	8	8	8	
	Never been to United States -----	11	SKIP TO Q.15e				
	<u>Other</u>						
34-36	1. 	51- 1	53- 1	55- 1	57- 1		
37-39	2. 	2	2	2	2		
40-42	3. 	3	3	3	3		
43-45	4. 	4	4	4	4		
46-48	5. 	5	5	5	5		

- 16a) Overall, how interested are you in visiting or re-visiting the United States in the next five years? Would you say you are... (READ LIST - CIRCLE ONE)

very interested ----- 58- 1
somewhat interested ----- 2
OR not interested ----- 3

59- 2
60-78 BLANK
79- 0
80- 5

- 16b) I would like you to compare the United States with other overseas places that you have visited on a vacation trip and those you might visit in the future. Even though some people know less about the United States than others do, everyone has impressions of what it would be like to vacation there.

(READ EXPLANATION THEN HAND QUESTIONNAIRE AND PEN/PENCIL TO RESPONDENT)

The following is a list of items that might attract people to choose a particular destination for their vacation. For each statement, please "X" one box to show whether you think the United States is (READ SLOWLY) a lot better than other overseas vacation places for that item, a little better than other places, the same as other places, not quite as good or not nearly as good as other places you might vacation.

	Compared with other places United States is...				
	A lot better	A little better	The same	Not quite as good	Not nearly as good
Variety of things to see and do--	10- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
High quality restaurants -----	11- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Value for my vacation money -----	12- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Budget accommodation -----	13- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Nightlife and entertainment (bars, clubs, dancing) -----	14- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Outstanding scenery -----	15- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Shopping -----	16- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Mountainous areas -----	17- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Personal safety, even when travelling alone -----	18- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Snow skiing (downhill/cross- country) -----	19- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Fast food restaurants -----	20- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Beaches for swimming and sunning -	21- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Casinos and gambling-----	22- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Amusement or theme parks -----	23- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Museums and art galleries -----	24- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Interesting and friendly local people -----	25- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Outdoor activities such as hiking, climbing -----	26- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Availability of package (all- inclusive) vacations -----	27- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Public transportation (eg airlines railways, local transit systems)	28- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Live theatre and concerts -----	29- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Resort areas -----	30- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Inexpensive restaurants-----	31- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Unique or different cultural groups such as Eskimo or Indian	32- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
National parks and forests -----	33- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Fishing -----	34- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Hunting -----	35- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
First class hotels -----	36- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Historical, archeological or military sites and buildings --	37- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Opportunities to increase one's knowledge -----	38- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Opportunities to escape from the ordinary -----	39- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Water sports such as surfing, water skiing, sailing, scuba diving -	40- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Kinds of things I like to do on vacation -----	41- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Opportunity for being daring and adventuresome-----	42- <input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5

43-77 BLANK

- 17a) Now I'd like you to think about places in **Canada** that people might go to on a vacation. What are the names of five places in Canada where people might go on a vacation? (RECORD BELDW UNDER Q.17a IN ORDER MENTIDNED) PROBE: What other places in Canada?
- 17b) Looking at this map of Canada, please tell me the names of three **other** places in Canada that people might go on a vacation? (HAND MAP - RECORD BELOW UNDER Q.17b IN ORDER MENTIDNED) PRDBE:) What other places?
- 17c) Which places in Canada, if any, have you ever been to? PROBE: Any other places ? (RECORD UNDER Q.17c - CIRCLE AS MANY AS APPLY. IF RESPONDENT MENTIONS PLACES NOT LISTED UNDER Q.17a OR Q.17b, RECORD BELOW UNDER "OTHER". IF NOT BEEN TO CANADA, CIRCLE 11 AND SKIP TO Q.17f)
- 17d) Which places, if any, have you been to in the past three years, since September, 1985? (RECORD UNDER Q.17d - CIRCLE ALL RESPDNSES)
- 17e) Which **one** thing about Canada would make you recommend it to someone else as a **vacation destination**?

6-
7-
8-
9-

- 17f) You have named a number of different places in Canada. (READ ALL PLACES MENTIDNED - Q.17a, Q.17b AND OTHER) Which **one** of these places would you be **most** interested in visting or re-visiting (RECORD UNDER Q.17f - MOST)

And which **one** would be your **second** choice? (RECORD UNDER Q.17f - 2nd)
And which **one** would be your **third** choice? (RECORD UNDER Q.17f - 3rd - TAKE BACK)

Q.17a		Q.17c	Q.17d	Q.17f											
		Ever been to	Been in past 3 yrs	Most	2nd	3rd									
10-12	<table border="1"><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr></table>										1. _____	49- 1	50- 1	52- 1	54- 1 56- 1
13-15	<table border="1"><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr></table>										2. _____	2	2	2	2 2
16-18	<table border="1"><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr></table>										3. _____	3	3	3	3 3
19-21	<table border="1"><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr></table>										4. _____	4	4	4	4 4
22-24	<table border="1"><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr></table>										5. _____	5	5	5	5 5
		<u>Q.17b</u>													
25-27	<table border="1"><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr></table>										6. _____	6	6	6	6 3
28-30	<table border="1"><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr></table>										7. _____	7	7	7	7 7
31-33	<table border="1"><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr></table>										8. _____	8	8	8	8 8
		Never been to Canada ----- 11 → SKIP TO Q.17f													
		<u>Other</u>													
34-36	<table border="1"><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr></table>										1. _____	51- 1	53- 1	55- 1	57- 1
37-39	<table border="1"><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr></table>										2. _____	2	2	2	2
40-42	<table border="1"><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr></table>										3. _____	3	3	3	3
43-45	<table border="1"><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr></table>										4. _____	4	4	4	4
46-48	<table border="1"><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr><tr><td></td><td></td><td></td></tr></table>										5. _____	5	5	5	5

- 18) Overall, how interested are you in visiting or re-visiting Canada in the next **five** years? Would you say you are... (READ LIST - CIRCLE ONE)

very interested ----- 58- 1
somewhat interested ----- 2
OR not interested ----- 3

59- ②
60-78 BLANK
79- ①
80- ⑦

1-1
RESP 2-5
6-9 BLANK

- 19a) Which of these daily newspapers, if any, do you read or look at regularly that is, at least three out of every six issues? (HAND CARD "D" - CIRCLE AS MANY AS APPLY)

NSW: Daily Telegraph -----10- 1
Sydney Morning Herald ----- 2
VIC: The Sun ----- 3
The Age ----- 4
The Herald ----- 5
QLD: Courier Mail ----- 6
Daily Sun ----- 7
SA: The Advertiser ----- 8
The News ----- 9
WA: Western Australian ----- 0
Daily News ----- 11

Other (SPECIFY) ----- 11-
Do not read daily newspapers ----- -11

- 19b) Which of these Sunday papers, if any, do you read or look at regularly, that is, at least two out of every four issues? (HAND CARD "E" - CIRCLE AS MANY AS APPLY)

NAT: Sun-Herald -----12- 1
Sunday Telegraph ----- 2
Weekend Australian ----- 3
VIC: Sunday Observer ----- 4
Sunday Press ----- 5
QLD: Sunday Mail ----- 6
Sunday Sun ----- 7
SA: Sunday Mail ----- 8
WA: Sunday Times ----- 9

Other (SPECIFY) ----- 13-
Do not read Sunday papers ----- -11

- 19c) Which of these weekly periodicals and magazines, if any, do you read or look at regularly, that is, two out of every four issues? (READ LIST - CIRCLE AS MANY AS APPLY)

New Idea -----14- 1
TV Week ----- 2
Woman's Day ----- 3
Bulletin/Newsweek ----- 4
Time ----- 5
Australasian Post ----- 6

Other (SPECIFY) ----- 15-
Do not read weekly periodicals
or magazines ----- -11

- 20) Which of the following magazines, if any, do you read or look at regularly, that is, two out of every four issues? (HAND CARD "F" - CIRCLE AS MANY AS APPLY)

Australian Womens Weekly -----16- 1
Better Homes and Gardens ----- 2
Reader's Digest ----- 3
Family Circle ----- 4
Cleo ----- 5
House and Garden ----- 6
Gourmet Traveller ----- 7
Let's Travel ----- 8

Other (SPECIFY) ----- 17-
Do not read magazines ----- -11

By now you may have realised that this survey is being conducted voluntarily on behalf of Tourism Canada for the Department of Regional Industrial Expansion. So that we can use your responses, we would like to ask you some questions that would be used for statistical purposes only. We want to assure you that your answers will be kept confidential in two ways: firstly, sensitive third party information is protected under the provision of Section 20 of the Access to Information Act, and secondly, your answers will be combined with those of other participants in the survey before being given to Tourism Canada.

- 21) Do you, yourself, have any close friends or relatives living in (COUNTRY) at the present time? (CIRCLE YES OR NO FOR EACH COUNTRY)

		Yes	No
Canada -----	23-	1	2
The United States -----	24-	1	2

- 22a) Thinking about everyone in your household, how many of them are under 18? (CIRCLE ONE)

25-0 1 2 3 4 5 6 or more

- 22b) Including yourself, how many are 18 or over (CIRCLE ONE)

26-1 1 2 3 4 5 6 or more

- 22c) Are all the members of your household related, or not?

Yes -----	27-	1
No -----		2
Single member household-----		3

- 22d) What is your marital status? (CIRCLE ONE)

Single -----	28-	1
Married -----		2
Living together -----		3
Divorced/separated/widowed --		4
Other -----		5

- 22e) What is your age? (RECORD NUMBER)

<div style="border: 1px solid black; display: inline-block; width: 20px; height: 20px;"></div>	<div style="border: 1px solid black; display: inline-block; width: 20px; height: 20px;"></div>	years
29	30	

- 22f) Are you self-employed?

Yes --	31-	1
No ---		2

- 22g) What is your occupation, that is, what kind of work do you do? (WRITE IN)

_____ 32-
33-

- 22h) What is the highest level of education you have completed?

Some/completed primary school -----	34-	1
Some/completed secondary school -----		2
Some/completed trade apprenticeship, business college or Diploma Technial College -		3
Some/completed university -----		4

- 22i) Are you the chief wage earner in your household?

Yes --	35-	1
No ---		2

22j) Which of these categories best describes your total **household** income before taxes in the 1987/1988 financial year? Please include all wages, salaries, pensions and income from other sources. Please just tell me the letter from this card. (HAND CARD "G" - CIRCLE ONE ONLY)

A. Under \$20,000 -----	36- 1
B. \$20,000 - \$29,999 -----	2
C. \$30,000 - \$39,999 -----	3
D. \$40,000 - \$49,999 -----	4
E. \$50,000+ -----	5
Refused -----	6

22k) Can you read, write or speak French or not? (CIRCLE ALL THAT APPLY)

	French
Read -----	37- 1
Write -----	2
Speak -----	3
None of these -----	4

38-BLANK

22l) RECORD SEX: Male -----39- 1
Female --- 2

22m) In which country were you born? (CIRCLE ONE)
In which country/countries were your parents born?

	Respondents Born	Parents Born
Australia	40- 1	41 -1
United Kingdom/Ireland	2	2
All other Europe	3	3
All others	4	4

22n) RECORD CITY OF INTERVIEW: Sydney ----- 42- 1
Melbourne ----- 2
Brisbane ----- 3
Adelaide ----- 4
Perth ----- 5

22o) RECORD POSTCODE:

43	44	45	46	

Respondent Name: _____
Address: _____
Telephone: _____

Interviewer Name: _____

Interviewer ID:

47	48	49	50	51	52

Length of Interview:

53	54

55-78 BLANK

79-0
80-8

CARD A

**Mainland USA (including
Alaska)**

Canada

Mexico

Central/South America

The West Indies/Caribbean

Africa

**Near/Middle East (including
Saudi Arabia, Israel etc)**

**Asia (eg India, Japan, China,
Indonesia, Philippines etc)**

Hawaii/Guam/American Samoa

**Other South Pacific (eg
Fiji/Tahiti/Western Samoa)**

New Zealand

**Europe including
United Kingdom**

CARD G

- A. Under \$20,000**
- B. \$20,000 - \$29,999**
- C. \$30,000 - \$39,999**
- D. \$40,000 - \$49,999**
- E. \$50,000+**

CARD B

A visit to friends or relatives is a trip whose primary purpose is to visit and spend time with friends or relatives

A touring trip is by car or bus or train through areas of a scenic beauty, cultural or general interest

A city trip is a trip to a city where you may shop, visit museums, enjoy entertainment, dine, attend plays or concerts, or just stroll around and enjoy the city

An outdoor trip is a trip in a natural area where you actively take part in such activities as camping, hunting, fishing, hiking or rafting.

A resort trip is a trip to a resort area where a wide variety of activities, such as beaches, skiing, golfing, tennis and so on, are available close by or on the premises

A trip to an amusement or theme park, exhibition or special event, is a trip taken primarily for the purpose of visiting a major theme park or exhibition or special event such as the World Cup, Expo or Olympic Games

A cruise is a trip on a cruise ship where you enjoy all the on-board activities and the planned stops at points of interest along the way.

A trip that combines business and pleasure is a trip whose primary purpose is business but you take some extra time for pleasure or vacation.

CARD C

Plane

Train

Bus between cities

**Public Transportation within
cities (eg Bus, subway, tram etc
but excluding taxis)**

Boat

Rented car

Private car

Camper or caravan

CARD D

NSW: Daily Telegraph
Sydney Morning Herald

VIC: The Sun
The Age
The Herald

QLD: Courier Mail
Daily Sun

SA: The Advertiser
The News

WA: Western Australian
Daily News

CARD E

NATIONAL: Sun-Herald
Sunday Telegraph
Weekend Australian

VIC: Sunday Observer
Sunday Press

QLD: Sunday Mail
Sunday Sun

SA: Sunday Mail

WA: Sunday Times

CARD F

Australian Womens Weekly

Better Homes and Gardens

Cleo

Family Circle

Gourmet Traveller

House and Garden

Let's Travel

Reader's Digest

APPENDIX III
DEFINITION OF U.S. 11 CENSUS DIVISIONS
AND 8 TRAVEL REGIONS

8 TRAVEL REGIONS

Travel South

Alabama
Arkansas
Florida
Kentucky
Louisiana
Mississippi
North Carolina
South Carolina
Tennessee
Virginia

Visit U.S. West

Alaska
Arizona
California
Nevada
Oregon
Washington

New England

Connecticut
Maine
Massachusetts
New Hampshire
Rhode Island
Vermont

Old West Trail Foundation

Montana
Nebraska
North Dakota
South Dakota
Wyoming

America's Heartland

Arkansas
Kansas
Louisiana
Missouri
Oklahoma

Foremost West

Arizona
Colorado
New Mexico
Utah
Wyoming

George Washington Country

Delaware
Maryland
Pennsylvania
Virginia
Washington, D.C.
West Virginia

Great Lakes

Illinois
Indiana
Iowa
Michigan
Minnesota
Ohio
Wisconsin

11 CENSUS DIVISIONS

West North Central

Iowa
Kansas
Minnesota
Missouri
Nebraska
North Dakota
South Dakota

East South Central

Alabama
Kentucky
Mississippi
Tennessee

New England

Connecticut
Maine
Massachusetts
New Hampshire
Rhode Island
Vermont

Middle Atlantic

New Jersey
New York
Pennsylvania

East North Central

Illinois
Indiana
Michigan
Ohio
Wisconsin

South Atlantic

Delaware
Washington, D.C.
Florida
Georgia
Maryland
North Carolina
South Carolina
Virginia
West Virginia

West South Central

Arkansas
Louisiana
Oklahoma
Texas

Mountain

Arizona
Colorado
Idaho
Montana
Nevada
New Mexico
Utah
Wyoming

Pacific

Alaska
California
Oregon
Washington

Pacific Islands

Guam
Hawaii
U.S. Trust Territories

Atlantic Islands

Puerto Rico
U.S. Virgin Islands

APPENDIX IV
95% STATISTICAL CONFIDENCE LEVELS

STATISTICAL TOLERANCES
(Maximum error ranges)
for the 95% level of confidence (two standard errors)

SIZE OF SAMPLE	EXPECTED OR OBSERVED PER CENT																
	1% or 99%	2% or 98%	3% or 97%	4% or 96%	5% or 95%	6% or 94%	8% or 92%	10% or 90%	12% or 88%	15% or 85%	20% or 80%	25% or 75%	30% or 70%	35% or 65%	40% or 60%	45% or 55%	50%
50				5.6	6.3	6.9	7.8	8.6	9.3	10.2	11.5	12.5	13.2	13.6	14.1	14.2	14.4
100				3.9	4.4	4.8	5.4	6.0	6.5	7.1	8.0	8.7	9.2	9.5	9.8	9.9	10.0
150			2.8	3.2	3.6	3.9	4.4	4.9	5.3	5.9	6.6	7.1	7.5	7.8	8.0	8.1	8.2
200			2.4	2.8	3.1	3.4	3.8	4.3	4.6	5.1	5.7	6.1	6.5	6.3	7.0	7.0	7.1
250		1.8	2.2	2.5	2.7	3.0	3.4	3.8	4.1	4.5	5.0	5.5	5.8	6.0	6.2	6.2	6.3
300		1.6	2.0	2.3	2.5	2.8	3.1	3.5	3.8	4.1	4.6	5.0	5.3	5.5	5.7	5.8	5.8
400	.99	1.4	1.7	2.0	2.2	2.4	2.7	3.0	3.3	3.6	4.0	4.3	4.6	4.8	4.9	5.0	5.0
500	.89	1.3	1.5	1.8	2.0	2.1	2.4	2.7	2.9	3.2	3.6	3.9	4.1	4.3	4.4	4.5	4.5
600	.81	1.1	1.4	1.6	1.8	2.0	2.2	2.5	2.7	2.9	3.3	3.6	3.8	3.9	4.0	4.1	4.1
800	.69	.98	1.2	1.4	1.5	1.7	1.9	2.1	2.3	2.5	2.8	3.0	3.2	3.3	3.4	3.5	3.5
1,000	.63	.90	1.1	1.3	1.4	1.5	1.7	1.9	2.1	2.3	2.6	2.8	2.9	3.1	3.1	3.2	3.2
1,500	.51	.72	.88	1.0	1.1	1.2	1.4	1.5	1.7	1.8	2.1	2.2	2.4	2.5	2.5	2.6	2.6

Given chance variability of measurement, this table indicates the range of values within which the "true" value of an observed percentage is likely to be found. For instance, given an observed value of 70%, based on a sample size of 250, the "true" value is likely to be in the range of $\pm 5.8\%$ (i.e. 75.8%-64.2%) 19 out of 20 times.

APPENDIX V
HOW TO INTERPRET A DISCRIMINANT MAP

Note: In the following description of how to interpret a discriminant map, Figure 6 in this report will be used as an example to illustrate some of the points discussed.

The purpose of this discriminant map is to provide a visual summary of the ways in which the segment groups differ from each other. It identifies the extent to which specific attributes differentiate or discriminate the segment groups.

On the map attributes appear as lines radiating from the center of the map whereas segment groups appear as points on the map.

The positions of the groups on the map reflect the differences among them. Basically, groups which are closer together on a discriminant map are more similar to each other than groups which are further apart.

The length and direction of the lines representing the attributes are also an important consideration.

The length of a line is directly proportional to the "discriminating power" of the attribute in question. For example, the attribute "usually buy vacation packages" is represented by a relatively long line because the variation in the ratings of the segment groups on this attribute were quite large. On the other hand, the attribute "do not have to spend a lot of money" is represented by a relatively short line because there was much less variation in the segment group ratings on this attribute.

The direction of the line relative to other lines reflects the degree of association between the attributes in question. For example, the attributes "use travel agent to help decide destination" and "like prearranged travel" point in the same direction. Therefore, segments which buy vacation packages are also the ones which like prearranged travel. Attributes pointing in opposite directions to each other are also highly correlated, except in a negative sense. Attributes which appear at right angles to each other are uncorrelated.

To determine the relative importance of the attributes to each of the groups the positions of the groups relative to the attribute lines are considered. For example, consider an imaginary line on the right side of the map which is perpendicular to the attribute "prefer guided tours". By sweeping this perpendicular to the left through the map (always maintaining its perpendicular orientation) the line initially encounters the point representing the Touring Package group. Continuing this sweep it then encounters the Guarded group followed lastly by the Budget Independent group.

The order in which groups are encountered is important because it gives the rank order of the mean ratings of each group on that particular attribute. With the attribute "prefer guided tours" it is apparent that package travelers would rate this as more important than independent travelers.

When interpreting a discriminant map it should be remembered that the map is only a summary and it therefore does not represent all the information present in the data. Nevertheless, the maps in this report account for at least 93% of the data and are thus a fairly good representation of the group-attribute relationships.

APPENDIX VI
MAP OF AUSTRALIA

AUSTRALIA





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